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ABSTRACT

This curriculum guide consists of materials for use in teaching the second year of a two-year course in marketing and distributive education. Included in the guide are field review information, an introduction, a course outline, a series of unit outlines, a bibliography, and a list of audiovisual materials. The following topics are addressed in the unit outlines: cooperative education programs in marketing, communication skills in marketing, merchandising skills in marketing, personal selling skills, math for marketing, product and service technology, display and sales promotion, advertising, human relations skills in marketing, management skills in marketing, and store organization and operations. Each unit contains some or all of the following: a unit outline; a statement of purpose; and a lesson plan that consists of correlated lists of topics, behavioral objectives and learning activities, and related resources as well as one or more supplements in the form of activity sheets, handouts, transparency masters, and survey instruments. (MN)

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ED248381

# CURRICULUM GUIDE
# FOR
# MARKETING AND DISTRIBUTIVE EDUCATION

(Second Year)

U.S. DEPARTMENT OF EDUCATION
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SOUTH CAROLINA DEPARTMENT OF EDUCATION

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# ACKNOWLEDGMENTS

The South Carolina Office of Vocational Education in cooperation with marketing and distributive education teachers has developed this Curriculum Guide for use in the second year of marketing and distributive education.

Serving as resource persons for the Curriculum Committee were Tim Coffey, State Supervisor for Marketing and Distributive Education, and Jewell Carmichael, District Consultant for Marketing and Distributive Education. Development and compilation was directed by Margaret R. Gregory, Vocational Curriculum Designer, Vocational Curriculum Development Section, State Department of Education. Other Vocational Curriculum Development Section staff members who helped produce this Guide were Patricia E. Kinsey, Editor, and Jim Lewallen, Typesetter. Graphics were provided by Jeannie Stricklin, a student at Lexington I Area Vocational Center.

The following members of the Curriculum Committee provided the expertise in the content area.

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## FIELD REVIEW

The field review of the **Second-Year Marketing and Distributive Education Curriculum Guide** was conducted in the fall of 1983. The teachers involved were Martha Smith (Strom Thurmond High School), Carl Vadasz (Lake City Career Center), Brenda Walters (Irmo-Chapin Career Center), Pandra Warren (Lexington Area Vocational Center), Lynn Nichols (North Augusta High School), and Kathy Trammell (T. L. Hanna High School).

Copies of the Guide were mailed to the review team. Therefore, no inservice or discussion was held concerning the parts of the guide or the method for using it. Some of the comments on the summary form reflected this procedure. The review team concluded that an inservice is necessary before distributing any curriculum materials whether individual or group-oriented.

The major concern of the review team was that the resources were not lined up with the particular learning activity. Going back and separating these was an impossible task. As you use the Guide, please note that several resources have been listed as possible references directly across from the Behavioral Objective and the first Learning Activity. The resources are teaching aides for all the activities in that objective. Since all teachers would not have all the resources listed, a variety was provided to include at least one the teacher could use.

The **Marketing and Distributive Education Curriculum Guide** is just that -- a guide. The teacher has the flexibility to rearrange the units and to allow more or less time for any units. The purpose of the Guide is to establish content so that all teachers in South Carolina cover approximately the same material and that new teachers have a plan for the year.

The State Office of Vocational Education appreciates the time and effort the field review team put into critiquing the Guide.

# TABLE OF CONTENTS

Acknowledgments ii

Field Review iii

Introduction 1

Course Outline 2

Course Content 3

- Orientation to Marketing, Vocational Education, and Cooperative Education
- Communication Skills in Marketing
- Merchandising Skills in Marketing
- Personal Selling Skills
- Math for Marketing
- Product and Service Technology
- Display and Sales Promotion
- Advertising
- Human Relations Skills in Marketing
- Management Skills in Marketing
- Store Organization and Operations

Bibliography 126

Audio-Visuals 131

# INTRODUCTION

The *Second-Year Marketing and Distributive Education Curriculum Guide* is designed to provide instruction and experience in the broad areas of marketing and distribution. This material is designed for use with students involved in the cooperative method of instruction and should enable students to benefit from classroom instruction and related on-the-job training.

Instruction is designed for use with students in the eleventh grade. However, these learning activities are independent of the first-year curriculum guide. First-Year Marketing and Distributive Education is not a pre-requisite for the student who is late in making a career choice in the area of marketing and distribution. However, the first-year program provides a solid foundation for the material presented in the *Second-Year Guide*.

The *Second-Year Guide* is organized into units each of which contains an outline, behavioral objectives, learning activities, related resources, and a suggested instructional time. Units may be shortened or lengthened depending upon the locale and the needs of the community. These units also emphasize the employment skills in the ten competency areas of marketing.

## SECOND-YEAR MARKETING AND DISTRIBUTIVE EDUCATION

| Course Outline | Suggested Instructional Time | Page |
|---|---|---|
| 1. Orientation to Marketing, Vocational Education, and Cooperative Education | 2 weeks | 3 |
| 2. Communication Skills in Marketing | 2 weeks | 10 |
| 3. Merchandising Skills in Marketing | 2 weeks | 17 |
| 4. Personal Selling Skills | 6 weeks | 27 |
| 5. Math for Marketing | 6 weeks | 51 |
| 6. Product and Service Technology | 2 weeks | 56 |
| 7. Display and Sales Promotion | 2 weeks | 63 |
| 8. Advertising | 5 weeks | 68 |
| 9. Human Relations Skills in Marketing | 3 weeks | 85 |
| 10. Management Skills in Marketing | 4 weeks | 98 |
| 11. Store Organization and Operations | 2 weeks | 116 |

Teaching Time: 2 weeks

## ORIENTATION TO MARKETING, VOCATIONAL EDUCATION, AND COOPERATIVE EDUCATION

### UNIT OUTLINE

I. Vocational Education

II. Review of Marketing
  A. Instructional Areas
  B. Occupational Areas

III. Cooperative Education

IV. DECA

**GENERAL PURPOSE:** To review the vocational approach to education, the career preparation goals of marketing and distributive education, the functions of cooperative education, and the role of DECA in the total instructional program.

UNIT: Orientation

| CONTENT AND ESSENTIAL LEARNING | BEHAVIORAL OBJECTIVES | PROCEDURES AND LEARNING ACTIVITIES | RELATED RESOURCES |
|---|---|---|---|
| I. Vocational Education | Following teacher instruction, the student will be able to define vocational education, make five statements about its history, and list three other vocational courses with 100% accuracy. | (T) 1. Define and discuss the purpose of vocational education.<br>(T) 2. Explain the history of vocational education.<br>(T) 3. Supply students with the list of course offerings in vocational education. | *Coordination in Cooperative Vocational Education*<br>*Organization and Administration of Distributive Education* |
| II. Review of Marketing<br>A. Instructional Areas<br>B. Occupational Areas | Following the review of marketing, the student will be able to define marketing, list the ten instructional areas, and list the seven occupational areas with 100% accuracy. | (T) 1. Administer a teacher-developed pretest for evaluation of marketing knowledge.<br>(T) 2. Define and discuss marketing.<br>(T/S)3. Distribute and discuss the supplement on instructional areas and occupational areas. | *Distributive Education Programs*<br>Supplement 1 |
| III. Cooperative Education | Given a teacher-developed test, the student will be able to define cooperative education and its guidelines and explain its importance and purpose as it relates to the students, community, and school with 100% accuracy. | (T) 1. Define cooperative education in relation to distributive education.<br>(T) 2. Compose a bifold pamphlet (8½x11) for distribution to the students which gives the statement of policy for laboratory and school.<br>(T/S)3. Distribute and discuss the marketing and distributive education statement of policy.<br>(T/S)4. Distribute and discuss all forms used in the cooperative education program. | *Your Career in Marketing*, pp. 136-137<br>*Cooperative Vocational Education*, pp. 22, 24, and 29<br>*Marketing and D.E. Teacher Handbook*, pp. 35 and 49<br>*Distributive Education Student Handbook*, p. 13<br>Supplement 2 |

**UNIT:** Orientation

| CONTENT AND ESSENTIAL LEARNING | BEHAVIORAL OBJECTIVES | PROCEDURES AND LEARNING ACTIVITIES | RELATED RESOURCES |
|---|---|---|---|
| IV. DECA | Given a class discussion on DECA, the student will be able to define DECA, state its purpose, and identify officers and national personnel with 100% accuracy. | (T) 1. Discuss the purpose and activities of DECA.<br>(T) 2. Provide students with names of officers and state personnel. | *Your Career in Marketing,* pp. 138, 142<br>*South Carolina DECA Guide*<br>*Distributive Education Student Handbook*<br>*DECA Is for Everybody*<br>*DECA Transparency Series* |
| | Following instruction in the DECA competitive and non-competitive events, the student will be able to list five individual competitive events, and all non-competitive events with 100% accuracy. | (T) 1. Describe competitive events and non-competitive events.<br>(T/S)2. Discuss the two kinds of events and how a student can participate. | |
| | Following a discussion of suggested chapter activities, the student will be able to identify with 100% accuracy all activities which are vital to the operation of a successful local chapter. | (T) 1. Present outline of ceremonies, meetings, professional development activities, and social functions.<br>(T/S)2. Nominate and elect a slate of officers for the local DECA Chapter. | |

Supplement I

## Marketing and Distributive Education Instructional Areas

Advertising

Communications

Display

Human Relations

Math

Merchandising

Management

Operations

Product and Service Technology

Selling

## Marketing and Distributive Education Occupational Areas

Advertising services

Apparel and accessories

Finance and credit

Food Marketing

Restaurant marketing

General merchandise

Petroleum marketing

# MARKETING AND DISTRIBUTIVE EDUCATION INFORMATION PAMPHLET

HOME TOWN
HIGH SCHOOL

MARKETING & DISTRIBUTIVE
EDUCATION

## STATEMENT OF POLICY

**Laboratory**

**School**

## MARKETING AND DISTRIBUTIVE EDUCATION STATEMENT OF POLICY

**Laboratory**

1. A distributive education student must work in an approved distributive occupational laboratory a minimum of 540 hours during the regular school year. This is an average of 15 hours each week during the school year.

2. The 540 hours during the regular school year count only as one credit towards graduation. To obtain the full two credits towards graduation, classroom work must be maintained. On-the-job training is only one-third of the total credit received in distributive education.

3. Maximum hours per week is dependent upon state labor laws and the student's ability to work and still maintain satisfactory grades in all school subjects.

4. Once a student has been employed, the student cannot change jobs without the permission of the coordinator. A change will be made only after the coordinator is convinced that a change will benefit the student.

5. It is not important how much a student can *earn* from his/her work station, but how much he/she can *learn* that counts.

6. A student may be discharged from the job without the employer's consulting the coordinator. Any student who is discharged from his/her job by the employer for a justifiable reason will be dropped from the program.

7. Each student is responsible for securing his/her own training station. This will be done with the guidance and assistance of the teacher-coordinator. Several students may be sent to interview for one position so each one must do his/her best to get the job. The student is allowed six weeks at the beginning of school to secure a job. At the end of this time, he/she must drop the course if a training station has not been found.

## School

1. School obligations come first. Distributive education students must make up all detentions and report to teachers when told, even if it conflicts with work. It is entirely possible to avoid such obligations and every distributive education student is responsible for doing just that.

2. If a distributive education student is too ill to report to school, he/she is too ill to report to work. Contact the employer by telephone immediately. Time off from work for any other reason should be requested of the employer at least two weeks in advance.

3. A student may leave school after classes are completed whether he/she works that day or not. Upon leaving school, the student will report directly to work or home.

4. If a student is unemployed for a period of time for no fault of his/her own, the student will be rescheduled into study hall in the afternoon hours. This is in the interest of maintaining the best scholastic average possible.

5. Distributive education counts as four credit hours toward graduation. One credit is taken during the junior year, but three credits are given during the senior year. These credits are recognized by colleges and universities throughout the nation.

6. Distributive education students represent their school and the distributive education program while on the job and in school. Their conduct should be *far above average*. Therefore, any distributive education student who does not conduct him/herself satisfactorily according to established rules and policies can expect to be dropped from the distributive education program regardless of the consequences.

## ORIENTATION

## BIBLIOGRAPHY

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*South Carolina DECA Guide.* Columbia, S. C.: South Carolina Department of Education, 1981.

*FILM*
"DECA is for Everybody," Reston, Va.: DECA Related Materials Service, 1979.

*TRANSPARENCIES*
"DECA Transparency Series" (Order No. CSRO15). Reston, Va.: DECA Related Materials Service, 1981.

Teaching Time: 2 weeks

## COMMUNICATION SKILLS IN MARKETING

### UNIT OUTLINE

I. Communication Definition
   A. Verbal
   B. Non-Verbal

II. Scope of Marketing Communications
   A. Communication Process
   B. Types of Communication

III. Barriers to Effective Communication

IV. Direction of Marketing Communication

**GENERAL PURPOSE:** To explain the scope and nature of communications used in marketing and to provide experiences which permit application of the principles of effective communication.

| CONTENT AND ESSENTIAL LEARNING | BEHAVIORAL OBJECTIVES | PROCEDURES AND LEARNING ACTIVITIES | RELATED RESOURCES |
|---|---|---|---|
| I. Communication Definition<br>A. Verbal<br>B. Non-Verbal | Following teacher instruction, the student will be able to define communication and identify and list at least one verbal and one nonverbal element with 100% accuracy. | (T) 1. Define and discuss effective communication.<br>(T/S) 2. Discuss the art of sending and receiving clear messages.<br>(T/S) 3. Cite and discuss examples of situations involving effective communications and non-effective communications.<br>(T) 4. Discuss factors which influence the meaning of what is being communicated. Explain the difference between verbal and nonverbal communications.<br>(S) 5. Prepare marketing situations which illustrate verbal communication and non-verbal communication. | *Communicating at Work*, Chapter 1<br>*Retailing: Principles and Practices*, Chapter 13<br>*Food Marketing*, p. 21<br>*Communications* (LAP 13, No. 123), (LAP 16, No. 096 and No. 127), (LAP 5, No. 166 and No. 151) |
| II. Scope of Marketing Communications<br>A. Communication Process | Given a role-playing situation based on the communication process, the student will be able to identify the sender of the message, the message component, the receiver of the message, and the channel of communication with 100% accuracy. The student will be able to identify at least two positive feedback actions in the role-playing situation. | (T) 1. Using visual aids, describe how people communicate with one another. Discussion should include (but not be limited to ) the process of a sender encoding a message through a channel to a receiver who encodes the message and provides feedback to the sender. | *Fundamentals of Selling*, pp. 139-143<br>*Communications* (LAP 42, No. 160) |

**UNIT:** Communication

| CONTENT AND ESSENTIAL LEARNING | BEHAVIORAL OBJECTIVES | PROCEDURES AND LEARNING ACTIVITIES | RELATED RESOURCES |
|---|---|---|---|
| | | (T) 2. Discuss characteristics of the sender or source of a message as it relates to marketing. | *Fundamentals of Selling,* pp. 144-149 |
| | | (S) 3. Brainstorm for examples of sources of messages in marketing. | |
| | | (T) 4. Discuss characteristics of the message and relate it to communication of a sales message. | *Fundamentals of Selling,* pp. 150-155 |
| | | (S) 5. Identify message contained in one newspaper advertisement, one television advertisement, and one written business communication of the student's choice. | |
| | | (T) 6. Explain the characteristics of the receiver in the communication process and identify the receiver in marketing communication examples. | *Fundamentals of Selling,* pp. 162-169<br>*Communicating at Work,* p. 25 |
| | | (T) 7. Explain personal and non-personal channels of communication. | *Fundamentals of Selling,* pp. 156-161 |
| | | (S) 8. Bring to class three examples of personal communications and three examples of non-personal communications. | |
| | | (T) 9. Discuss the role of feedback in the communication process. | *Communicating at Work,* p. 26 |

**UNIT:** **Communication**

| CONTENT AND ESSENTIAL LEARNING | BEHAVIORAL OBJECTIVES | PROCEDURES AND LEARNING ACTIVITIES | RELATED RESOURCES |
|---|---|---|---|
| | | (S) 10. Role play an activity which demonstrates the importance of positive feedback in marketing situations. | *Food Services*, p. 38 |
| B. Types of Communication | Following teacher instruction, the student will be able to list the five types of communication and give at least two examples of each with 80% accuracy. | (T) 1. Discuss and present examples of communication from (but not limited to) the following:<br>a. Speaking - job interview, telephone etiquette, sales presentation.<br>b. Listening - personnel management.<br>c. Writing - business letters, memos, advertisements, signs, job applications, sales checks, purchase orders.<br>d. Reading - bulletin board announcements, employee newsletters.<br>e. Non-verbal - gestures, body movement. | *Food Marketing*, pp. 22, 23<br>*Communicating at Work*, pp. 28, 29<br>*Communications* (LAP 33, No. 130), (LAP 9, No. 114), (LAP 30, No. 131), (LAP 29, No. 125 and No. 126) |
| | | (T/S) 2. Arrange students in small groups and assign each group one type of communication. Have each group prepare a skit or presentation to demonstrate how that type of communication can be used effectively in marketing. | |

| CONTENT AND ESSENTIAL LEARNING | BEHAVIORAL OBJECTIVES | PROCEDURES AND LEARNING ACTIVITIES | RELATED RESOURCES |
|---|---|---|---|
| III. Barriers to Effective Communication | Following teacher instruction, the student will be able to list and define at least four barriers to effective communication with 80% accuracy. | (T) 1. Discuss a variety of barriers which may interfere with the marketing communication process and techniques of eliminating or overcoming these barriers. | *Communicating at Work*, Chapters 2, 3, 4<br>*Fundamentals of Selling*, pp. 139-143 |
| | | (T) 2. Define negative feedback and give examples of marketing situations where it may occur. | |
| | | (S) 3. Pair off and write a marketing script illustrating negative feedback. | |
| | | (T) 4. Explain how distortion occurs in the communication process and give examples of marketing situations where it may occur. | *Food Services*, p. 38<br>*Communications* (LAP 33, No. 161) |
| | | (T) 5. Explain the role that other people may have in interfering with the communication process between two people. | *Communicating at Work*, p. 94 |
| | | (T) 6. Discuss the importance of listening in the communication process and give examples of communication breakdown due to failure in listening to message. | *Food Marketing*, p. 26<br>*Food Services*, p. 35 |

**UNIT:** Communication

| CONTENT AND ESSENTIAL LEARNING | BEHAVIORAL OBJECTIVES | PROCEDURES AND LEARNING ACTIVITIES | RELATED RESOURCES |
|---|---|---|---|
| IV. Direction of Marketing Communication | Given a teacher-developed test on direction of communication, the student will be able to list and give at least one example of upward, downward, and horizontal communication with 100% accuracy. | (T) 1. Describe upward communication and give examples of upward communication from employee to employer. | *Communicating at Work,* Chapter 2<br>*General Merchandise Retailing,* p. 32<br>*Food Services*, p. 39 |
| | | (T) 2. Describe downward communication and give examples of downward communication from employer to employee. | *Communicating at Work,* Chapter 3<br>*General Merchandise Retailing,* p. 32<br>*Communications* (LAP 34, No. 100) |
| | | (T) 3. Describe horizontal communication and discuss examples of communicating with fellow employees as well as with customers. | *Communicating at Work,* Chapters 4 and 5<br>*Food Services*, pp. 33, 34, 37 |

# COMMUNICATION

## BIBLIOGRAPHY

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Teaching Time: 2 weeks

## MERCHANDISING SKILLS IN MARKETING

## UNIT OUTLINE

I. Role of Merchandising

II. Elements of Merchandising
   A. Merchandise Plan
   B. Mathematics of Merchandising
   C. Economic Climate
   D. Buying Merchandise
      1. Customer Demand
      2. Merchandise Selection
      3. Merchandise Resources
      4. Merchandise Orders
   E. Pricing
   F. Stock Management
      1. Physical Handling of Goods
      2. Protecting Stock
      3. Controlling Inventory

III. Merchandising Policies

**GENERAL PURPOSE:** To explain the role and function of merchandising in the marketing process and to develop merchandising and buying skills.

**UNIT:** **Merchandising**

| CONTENT AND ESSENTIAL LEARNING | BEHAVIORAL OBJECTIVES | PROCEDURES AND LEARNING ACTIVITIES | RELATED RESOURCES |
|---|---|---|---|
| I. Role of Merchandising | Given a teacher-developed test, the student will be able to define merchandising, explain its function, and list the five *rights* of merchandising with 100% accuracy. | (T) 1. Define merchandising and describe/illustrate the activities it includes. | *Merchandising and Buying,* p. 1<br>*Selecting and Buying Merchandise,* p. 99 |
| | | (T) 2. Explain function of merchandising as the buying and selling of merchandise at a profit. | *Retailing Principles and Practices,* Chapter 60 |
| | | (T) 3. Discuss importance of coordinating the five *rights* of merchandising: *right* product at the *right* place in the *right* quantity at the *right* time at the *right* price. | *Retailing Principles and Practices,* p. 13<br>*Fashion Merchandising,* p. 175 |
| II. Elements of Merchandising<br>A. Merchandise Plan | Given classroom discussion, the student will be able to name and describe the five components of the merchandise plan with 100% accuracy. | (T) 1. Explain how merchandise planning is based on the analysis of past performance and reflects current market and economic projections. | *Merchandising and Buying,* Chapter 2<br>*Retailing: Principles and Practices,* Chapter 59<br>*Retail Merchandising,* pp. 534-539<br>*Fashion Merchandising,* Chapter 17<br>*Selecting and Buying Merchandise,* pp. 105-106<br>*Merchandising* (LAP 29, Nos. 484, 399, 459, 436), (LAP 13, No. 407) |

| CONTENT AND ESSENTIAL LEARNING | BEHAVIORAL OBJECTIVES | PROCEDURES AND LEARNING ACTIVITIES | RELATED RESOURCES |
|---|---|---|---|
| | | (T) 2. List and discuss the components of merchandise planning. Describe relationship between the five components and successful planning.<br>a) Planned sales<br>b) Planned stock<br>c) Planned purchases<br>d) Planned markdown<br>e) Planned markup | |
| B. Mathematics of Merchandising | Following a classroom discussion, the student will be able to compute stock to sales ratio, stock turnover, and open to buy calculation problems with 90% accuracy. | (T) 1. Provide a sample six-month merchandising plan. | *Fashion Merchandising,* Chapter 13<br>*Selecting and Buying Merchandising,* pp. 21-27<br>*Merchandising and Buying,* p. 19 |
| | | (T) 2. Give stock-sales ratio formula and demonstrate how it is calculated. Explain its importance to merchandising. | |
| | | (T) 3. Give stock turnover formula and demonstrate how it is calculated. Relate its importance to merchandising. | *Retailing: Principles and Practices,* pp. 329-330 |
| | | (T) 4. Give open to buy formula and demonstrate calculation. Illustrate role of open to buy in merchandising. | |
| | | (S) 5. Complete a worksheet of stock-sales ratio, stock turnover, and open to buy calculation problems. | *Selecting and Buying Merchandise,* pp. 109-110<br>*Merchandising* (LAP 16, No. 429) |

**UNIT:** **Merchandising**

| CONTENT AND ESSENTIAL LEARNING | BEHAVIORAL OBJECTIVES | PROCEDURES AND LEARNING ACTIVITIES | RELATED RESOURCES |
|---|---|---|---|
| C. Economic Climate | Following classroom discussion, the student will be able to list and describe the five economic factors which influence merchandise planning with 100% accuracy. | (T/S) 1. Brainstorm for ideas on environmental and economic factors which affect merchandise planning. Relate these factors to those prevalent in your particular community and speculate on their impact on merchandise planning.<br>(S) 2. Interview a local merchant to determine what, if any, economic or environmental factors have affected the merchandising of products or services this year. Share findings with class. | |
| D. Buying Merchandise<br>1. Customer Demand | Following classroom instruction, the student will be able to describe at least three methods of determining customer demand with 100% accuracy. | (T) 1. Explain importance of studying customer wants and needs.<br>(T/S) 2. Discuss methods of determining customer demand. Develop and administer a simple market survey to determine demand for a product of interest to students. | *Merchandising and Buying,* Chapter 3<br>*Fashion Merchandising,* Chapter 12<br>*Retail Merchandising,* pp. 183-192<br>*Selecting and Buying Merchandise,* Section 2<br>*Merchandising* (LAP 7, Nos. 488-A, 434-A), (LAP 11, Nos. 477, 478, 487, 452-A) |

**UNIT:** Merchandising

| CONTENT AND ESSENTIAL LEARNING | BEHAVIORAL OBJECTIVES | PROCEDURES AND LEARNING ACTIVITIES | RELATED RESOURCES |
|---|---|---|---|
| 2. Merchandise Selection | Following classroom instruction, the student will be able to list at least four factors in merchandise selection and describe the relationship among the four with 100% accuracy. | (T) 1. Describe factors in merchandise selection including (but not limited to) quality, fashion orientation, price ranges, depth and breadth of assortment, brand policy, and image.<br>(T/S) 2. Choose a local retailer and develop a merchandise profile by relating selection factors given to stock selection found in that store. | *Retail Merchandising*, pp. 193-213<br>*Fashion Merchandising*, Chapter 14<br>*Selecting and Buying Merchandise*, Section 5<br>*Merchandising* (LAP 10, No. 440-A), (LAP 18, No. 423-A) |
| 3. Merchandise Resources | Given a teacher-developed test, the student will be able to identify at least three methods of locating vendors and at least four factors in choosing a supplier with 100% accuracy. | (T) 1. Describe methods of locating merchandise and factors in choosing a supplier.<br>(T/S) 2. Discuss related reading. | *Retail Merchandising*, pp. 215-231<br>*Selecting and Buying Merchandise*, pp. 127-128 |
| 4. Merchandise Orders | Given a blank purchase order and necessary buying information, the student will be able to calculate discounts, determine billing dates, figure delivery dates, and complete the order with 85% accuracy. | (T) 1. Review *terms of sale* including discounts, delivery and dating. | *Selecting and Buying Merchandise*, pp. 64-67, 129-132, 143-152<br>*Merchandising* (LAP 10, Nos. 402-A and 468-A), (LAP 20, No. 409)<br>*Retailing: Principles and Practices*, Chapter 61<br>*Retailing Merchandising*, pp. 245-265<br>*Merchandising and Buying*, pp. 40-41<br>*Receiving, Checking, Marking, Stocking Clerk*, Chapter 2 |

| CONTENT AND ESSENTIAL LEARNING | BEHAVIORAL OBJECTIVES | PROCEDURES AND LEARNING ACTIVITIES | RELATED RESOURCES |
|---|---|---|---|
| | | (S) 2. Complete worksheets or practice problems for calculating and interpreting discount, delivery, and dating terms.<br>(T) 3. Using a sample purchase order, explain step by step procedure for properly completing form.<br>(S) 4. Practice completing purchase order forms. | |
| E. Pricing | Given a teacher-developed test, the student will be able to identify three internal factors and three external factors which affect price and complete test items on the mathematics of pricing with 85% accuracy. | (T) 1. Discuss internal factors which influence pricing such as cost of goods, selling costs, store image and customer appeal.<br>(T) 2. Describe external factors which affect retail pricing such as supply and demand, competition, and legal restrictions.<br>(T/S) 3. Divide students into small groups. Assign each group a local retail business and have them analyze the pricing of that business as it has been affected by internal and external factors. | *Selecting and Buying Merchandise*, pp. 79-81<br>*Merchandising and Buying*, pp. 46-48<br>*Retailing: Principles and Practices*, Chapter 58<br>*Retail Merchandising*, pp. 318-323<br>*Merchandising* (LAP 41, No. 420), (LAP 42, No. 489) |

**UNIT:** Merchandising

| CONTENT AND ESSENTIAL LEARNING | BEHAVIORAL OBJECTIVES | PROCEDURES AND LEARNING ACTIVITIES | RELATED RESOURCES |
|---|---|---|---|
| | | (T) 4. Explain markup, initial markup, and maintained markup. Illustrate formulas for determining markup percentages based on retail and on cost. Define and demonstrate markdown. | *Retailing: Principles and Practices,* Chapter 41<br>*Retail Merchandising,* p. 335<br>*Selecting and Buying Merchandise,* pp. 165-168<br>*Merchandising,* (LAP 38, Nos. 396 and 460)<br>*Jeffrey's Department Store: A Retailing Simulation Employees' Guide,* Simulation No. 4 |
| | | (S) 5. Complete worksheet on pricing calculations. | |
| | | (S) 6. Complete mini-simulation on "Buying and Pricing." | |
| F. Stock Management<br>1. Physical Handling of Goods | Given a teacher-developed test, the student will be able to define quality check and quantity, list three quantity checking methods, and list five items of information found on a price ticket with 100% accuracy. | (T) 1. Discuss and illustrate the receiving, checking and marking of ordered merchandise. | *Retailing: Principles and Practices,* p. 169<br>*Retail Merchandising,* pp. 275-292<br>*Merchandising and Buying,* pp. 57-64<br>*Merchandising* (LAP 5, No. 428-A), (LAP 36, No. 441) |
| | | (T/S) 2. Complete mini-simulation on "Warehousing Department" or similar activity to practice receiving, checking and marking goods. | |

44

45

**UNIT:** Merchandising

| CONTENT AND ESSENTIAL LEARNING | BEHAVIORAL OBJECTIVES | PROCEDURES AND LEARNING ACTIVITIES | RELATED RESOURCES |
|---|---|---|---|
| 2. Protecting Stock | Given a teacher-developed test, the student will be able to list five effective stockkeeping practices and describe at least one method of internal theft and two methods of external theft with 100% accuracy. | (T) 1. Discuss stockkeeping techniques, safety considerations, and causes and prevention of stock shortages/ damages. | *Retailing: Principles and Practices*, Chapters 20 and 21<br>*Retail Merchandising*, pp. 293-299<br>*Merchandising and Buying*, pp. 64-66<br>*Jeffrey's Department Store: A Retailing Simulation Employee's Guide*, Simulation 7 |
| | | (T) 2. Invite a local merchant to speak to the class to describe stockkeeping practices, as well as personal experiences with internal and external thefts. | |
| 3. Controlling Inventory | Given a teacher-developed test, the student will be able to define physical inventory, perpetual inventory, the application of each, and complete a unit control inventory record with 100% accuracy. | (T) 1. Define the terms physical and perpetual inventory. Describe relationship of the two inventory methods. | *Retailing: Principles and Practices*, Chapter 39<br>*Retail Merchandising*, pp. 547-553<br>*Fashion Merchandising*, Chapters 15 and 16<br>*Selecting and Buying Merchandise*, Section 3<br>*Merchandising* (LAP 18, No. 447-A) (LAP 26, Nos. 462-A and 463-A), (LAP 27, Nos. 401 and 414), (LAP 5, Nos. 427-A, 428-A and 470-A) |
| | | (T/S) 2. Distribute problem worksheet to illustrate how retailers can determine stock counts, overages or shortages using physical inventory and perpetual inventory information. | |

**UNIT:** **Merchandising**

| CONTENT AND ESSENTIAL LEARNING | BEHAVIORAL OBJECTIVES | PROCEDURES AND LEARNING ACTIVITIES | RELATED RESOURCES |
|---|---|---|---|
| | | (T) 3. Explain dollar control method and unit control method of inventory control.<br>(S) 4. Complete a practice problem to determine ending perpetual inventory. Compare it to ending physical inventory to determine shrinkage using the dollar control method. | |
| III. Merchandising Policies | Given a teacher-developed test, the student will be able to name four ethical considerations of buying and identify state and federal legislation regulating trade practices, pricing, and merchandising with 100% accuracy. | (T) 1. Discuss ethical conduct expected of the buyer and the vendor.<br>(T) 2. Discuss legal aspects of buying, fair trade practices, and governmental regulations affecting merchandising. | *Retail Merchandising*, pp. 236-243<br>*Selecting and Buying Merchandising*, pp. 69-71<br>*Merchandising and Buying*, Chapter 7<br>*Merchandising*, (LAP 20, No. 411), (LAP 34, No. 492)<br>*Retailing: Principles and Practices*, Chapter 56 |

48

49

# MERCHANDISING

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Teaching Time : 6 weeks

## PERSONAL SELLING SKILLS

## UNIT OUTLINE

- I. Product Knowledge
  - A. Knowing Merchandise
  - B. Arranging Merchandise
- II. Customer Relations
  - A. Types of Customers
  - B. Customer Behavior
  - C. Customer Analysis
  - D. Attracting Customers
  - E. Buying Motive
- III. Salesmanship
  - A. Sales Presentation
  - B. Selling Services
  - C. Telephone Sales

**GENERAL PURPOSE:** To describe the interacting relationship of product knowledge, customer relations, and salesmanship.

**UNIT:** Personal Selling Skills

| CONTENT AND ESSENTIAL LEARNING | BEHAVIORAL OBJECTIVES | PROCEDURES AND LEARNING ACTIVITIES | RELATED RESOURCES |
|---|---|---|---|
| I. Product Knowledge<br>A. Knowing Merchandise | Given an article of merchandise, the student will be able to demonstrate the ability to locate information about the article by scoring 20% higher on a post-test than was achieved on the pre-test. | (T) 1. Administer a teacher-developed pre-test on product knowledge selecting an article for which students have no product knowledge.<br>(T) 2. Define *product knowledge* and discuss sources for obtaining the following.<br>a. Background/history of product<br>b. Appearance of product<br>c. Manufacturing of the product<br>d. Uses of the product<br>e. Serviceability of product<br>f. Care of the product<br>g. Competing products<br>(S) 3. Using the sources provided, secure product knowledge on the selected articles.<br>(S) 4. Complete post-test on unknown articles using the sources. | *Salesmanship Fundamentals,* pp. 152-168<br>*Fundamentals of Selling,* pp. 189-195 |
| B. Arranging Merchandise | Given articles of merchandise, the student will be able to arrange merchandise into a display. The display must be graded acceptable by the instructor. | (T) 1. Describe the *principles of display* focusing on interior displays.<br>a. Open display<br>b. Closed display<br>c. Platform display<br>d. Wall display | *Retail Merchandising,* pp. 439-454 |

UNIT: **Personal Selling Skills**

| CONTENT AND ESSENTIAL LEARNING | BEHAVIORAL OBJECTIVES | PROCEDURES AND LEARNING ACTIVITIES | RELATED RESOURCES |
|---|---|---|---|
| | | (T) 2. Discuss the rules to follow in displaying merchandise for display.<br>a. Sufficient aisle space<br>b. Visibility of display<br>c. Customer examination<br>(S) 3. Using the articles provided by the teacher and the principles/rules for display, construct an interior display in area provided.<br>(T/S)4. Critique and discuss student displays. | *Fundamentals of Selling,* pp. 459-465 |
| II. Customer Relations<br>A. Types of customers | Given a list of the five types of customers, the student will be able to describe each type of customer with 75% accuracy. | (T) 1. Distribute and discuss handout on types of customers emphasizing the means of recognizing each type.<br>a. Nervous customer<br>b. Dependent customer<br>c. Disagreeable customer<br>d. Trying customer<br>e. Common sense customer<br>(T) 2. Detail circumstances that would cause a customer to fit into the above categories.<br>(T/S)3. Discuss particular businesses which would be frequented by one type of customer (i.e., business that would have nervous customers). | Supplement 1 |

54

55

| CONTENT AND ESSENTIAL LEARNING | BEHAVIORAL OBJECTIVES | PROCEDURES AND LEARNING ACTIVITIES | RELATED RESOURCES |
|---|---|---|---|
| | | (T) 4. Administer teacher-developed test on the types of customers. | |
| B. Customer Behavior | Following a discussion on customer behavior, the student will be able to compile a report on customer behavior in local stores by observing at least three types of behavior. | (T) 1. Define and identify reasons customers buy stressing needs and wants. | *Marketing and Distribution,* pp. 72- 90 |
| | | (T) 2. Detail/discuss the various types of customers and how to recognize these types.<br>a. Impulsive<br>b. Undecided<br>c. Deliberate<br>d. Argumentative<br>e. Friendly<br>f. Decisive<br>g. Silent<br>h. Young/old | *Marketing: Practices and Principles,* pp. 44-51 |
| | | (S) 3. Visit local stores and compile survey on the types of customer behavior observed. Report findings to class. | *Fundamentals of Selling,* pp. 104-134<br>Supplement 2 |
| C. Customer Analysis | Following a discussion on customer analysis, the student will be able to complete the *Review Questions* from the text with 70% accuracy. | (T) 1. Define the buying cycle and explain its function. | *Marketing: Practices and Principles,* pp. 53-81 |

**UNIT:** **Personal Selling Skills**

| CONTENT AND ESSENTIAL LEARNING | BEHAVIORAL OBJECTIVES | PROCEDURES AND LEARNING ACTIVITIES | RELATED RESOURCES |
|---|---|---|---|
| | | (T) 2. Discuss/explain market segmentation. Define these segments.<br>a. Domestic<br>b. Foreign<br>c. Geographic<br>d. Income<br>e. Occupation<br>f. Education<br>g. Sex<br>h. Age groupings<br>i. Social class | *Marketing and Distribution,* pp. 60-68 |
| | | (S) 3. Complete assigned reading in text and review questions at end of chapter. | *Fundamentals of Selling,* pp. 104-134 |
| D. Attracting Customers | Given instruction on types of merchandise and how to attract customers, the student will be able to complete *Discussion Questions* in text with 70% accuracy. | (T/S) 1. Show several kinds of varying goods and have students respond with ways they would try to attract customers to buy the goods. | *Fundamentals of Selling,* pp. 110-129 |
| | | (T) 2. Detail the ways of using goods to attract customer interest.<br>a. Past sales<br>b. Trade information<br>c. Marketing research | |
| | | (T/S) 3. Arrange for local sales persons to visit class and discuss how they attract the interest of a customer. | |
| | | (S) 4. Complete reading assignment in text. Discuss questions at end of text. | |

**UNIT:** Personal Selling Skills

| CONTENT AND ESSENTIAL LEARNING | BEHAVIORAL OBJECTIVES | PROCEDURES AND LEARNING ACTIVITIES | RELATED RESOURCES |
|---|---|---|---|
| E. Buying Motives | Given information on buying motives, the student will be able to compile a list of at least five motives for buying items observed in a local store. | (T) 1. Discuss buying motives and their importance in influencing sales.<br>(T) 2. Classify and detail the various motivations for buying.<br>a. Primary motives<br>b. Selective motives<br>c. Patronage motives<br>d. Rational motives<br>e. Emotional motives<br>(T) 3. Distribute a teacher-developed questionnaire on buying motives. Questionnaire should include why item was purchased.<br>a. Price considerations<br>b. Store considerations<br>c. Brand considerations<br>(S) 4. Complete questionnaire on a recent purchase.<br>(T) 5. Detail/discuss key concepts used in analyzing buying motives.<br>a. Response-action<br>b. Cues<br>c. Patterns<br>(S) 6. Locate and bring to class a list of buying motives observed in visits to local stores. | *Marketing and Distribution*, pp. 72-94<br>*Marketing: Practices and Principles*, pp. 63-84 |

**UNIT:** **Personal Selling Skills**

| CONTENT AND ESSENTIAL LEARNING | BEHAVIORAL OBJECTIVES | PROCEDURES AND LEARNING ACTIVITIES | RELATED RESOURCES |
|---|---|---|---|
| III. Salesmanship<br>A. Sales Presentation | Given instruction in sales procedures, the student will be able to demonstrate knowledge of concepts by conducting a sales presentation in class. The presentation must be rated acceptable by the instructor. | (T) 1. Detail, discuss and explain the steps to follow in a sales presentation. Beginning with preparation, follow these basic sales steps.<br>a. Approach<br>b. Customer need<br>c. Demonstrate merchandise<br>d. Answer questions<br>e. Handle objections<br>f. Close the sale<br>g. Suggest related goods<br>h. Follow-up<br>(T) 2. Discuss approach and greeting and how to keep interest. Use examples of good approach and poor approach, how to note a lack of interest, or when a customer is losing interest.<br>(T) 3. Assign each student a sales presentation to complete in class using a product of the student's choice.<br>(T/S)4. Tape the presentation with the teacher or another student posing as the *customer.* Allow for sufficient time to avoid *buying too easily*.<br>(T) 5. Rate each sales presentation using the tape recording. | *Fundaments of Selling,*<br>pp. 270-336 |

**UNIT:** **Personal Selling Skills**

| CONTENT AND ESSENTIAL LEARNING | BEHAVIORAL OBJECTIVES | PROCEDURES AND LEARNING ACTIVITIES | RELATED RESOURCES |
|---|---|---|---|
| | Given a feedback analysis of the sales presentation, the student will be able to identify at least two strengths and two weaknesses of the presentation. The student will submit a plan for correcting the weaknesses which must be rated acceptable by the instructor. | (T/S) 1. Using the tape playback, point out weakness in sales presentation.<br>a. Answering objections<br>b. Closing sale<br>c. Suggestion selling<br>(T) 2. Review and discuss problem areas using text for review.<br>(T/S) 3. Invite salespersons to class for discussion on how to handle problem areas of objections, closing and suggestion selling.<br>(S) 4. Submit a synopsis of the sales presentation pinpointing how weak areas could have been improved. | *Salesmanship Fundamentals*, pp. 268-320<br>*Fundamentals of Selling*, Chapter 10 |
| B. Selling Services | Given classroom instruction, the student will be able to complete a teacher-developed test on services that relate to goods sold by scoring at least 70% on the test. | (T) 1. Define and discuss material from text on customer services.<br>a. Guarantees<br>b. Adjustments/returns<br>c. Delivery<br>d. Installation/repair<br>e. Service contracts<br>(S) 2. Have students complete a teacher-prepared test on service. | *Marketing and Distribution*, pp. 449-456 |

| CONTENT AND ESSENTIAL LEARNING | BEHAVIORAL OBJECTIVES | PROCEDURES AND LEARNING ACTIVITIES | RELATED RESOURCES |
|---|---|---|---|
| C. Telephone Sales | Following teacher instruction, the student will be able to develop an outline for a telephone sales presentation and submit to the instructor for acceptability. | (T) 1. Discuss rules for telephone selling using text.<br>(T) 2. Detail methods for getting attention and creating desire in selling by telephone.<br>(T) 3. Discuss mechanics of a sales talk by telephone.<br>a. Planning<br>b. Need to get to a point<br>c. Ask question early in the conversation to hold interest.<br>(S) 4. Using concepts detailed and discussed, compile a written sales presentation for a telephone sale using a product or service of the student's choice. | *Fundamentals of Selling,* pp. 376-388 |

## TYPES OF CUSTOMERS AND HOW TO SERVE THEM*

### Nervous Customers

| For customers who are: | You will need: |
|---|---|
| Tired and cross | Patience |
| Fussy and nervous | Consideration |
| Excitable | Quiet manner |
| Impatient | Dispatch |
| Unreasonable | Calmness |

### Trying Customers

| For customers who are: | You will need: |
|---|---|
| Critical | Knowledge of goods |
| Indifferent | Tact |
| Silent | Perseverance |
| Bargain hunters | Convincing manner |

### Dependent Customers

| For customers who are: | You will need: |
|---|---|
| Timid and sensitive | Gentleness |
| Undecided | Decision |
| Old and deaf people | Sympathy |
| Children | Power to think for them |
| Foreigners | Helpfulness |

### Common-Sense Customers

| For customers who are: | You will need: |
|---|---|
| Courteous | Courtesy and intelligence |
| Intelligent | Efficiency |

### Disagreeable Customers

| For customers who are: | You will need: |
|---|---|
| Skeptical | Candid manner |
| Inquisitive | Knowledge |
| Talkative | Courteous brevity |
| Insulting | Self-control |

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*From *Retail Salesmanship*, Merchants Service. Dayton, Ohio: The National Cash Register Co., pp. 4-5.

## SECTION I: SELLING*

I. Selling in the American Economy

A. Modern Definition of Selling

Selling is the process of helping people to best fulfill their needs. Selling helps people to recognize their needs and wants and assists them in translating this recognition into a decision to purchase a product or a service that fills these needs or wants.

B. Scope

1. Personal selling - includes selling in which the salesman deals personally with the customer.

2. Non-personal selling - includes all sales activities to groups by advertising (whether in print, on radio or television), by displays, or by sales promotion.

C. Types of Selling Situations

1. Retail

a. Sometimes called "over-the-counter" selling.

b. Final selling - the sale of the product to the ultimate consumer; the buyer usually goes to the store for the purchase.

2. Wholesale

a. Limited to selling of product to a dealer who will sell it again.

b. In wholesale selling, the seller generally goes to the buyer.

3. Specialty selling

a. Selling of a single product or a line of products

b. Specialty salesmen deal with:

*From *State of Florida Curriculum Guide.* Tallahassee, Fla.: State Department of Education, 1974.

(1) manufacturers (raw materials)

(2) wholesalers

(3) retailers

(4) consumers (stocks, bonds, real estate, and some products sold direct to the consumer such as Avon products)

4. Service selling

   a. Salesman sells services his firm provides

   b. Business services (credit bureaus, banks, advertising agencies)

   c. Repair (automotive, television)

D. Advantages of the Sales Profession

1. Security
Experience in sales can assure job security. This is the only profession in which the employee writes his own pay check.

2. Income
No other employee group earns as high an average income as salesmen.

3. Advancement
Executives and specialists are sometimes selected from the ranks of salesmen. This is one route by which a non-college person can get into top management.

4. Variety
Salesmen meet all kinds of people. No routine days, each day offers a different challenge.

E. Requirements of the Sales Profession

1. Personality - opens the door

a. Visual aspects

    (1) dress - must be conservative, business-like

    (2) grooming - must present clean, neat impression

    (3) sincere smile

b. Non-visual

    (1) voice - should show pleasantness, confidence, respect

    (2) personal manner

        (a) courteous bearing - must show respect and courtesy to customer at all times

        (b) friendly attitude - must show a genuine liking for people

        (c) gestures - avoid irritating mannerisms (coughs, "ah's", twitches, etc.)

        (d) speech - grammatical errors show and make an unfavorable impression which is apt to destroy the customer's confidence. A large, descriptive vocabulary is one of a salesman's greatest assets, but he should adapt his vocabulary to the customer, never use it to "show off."

2. Character

    a. Self-control

    b. Consideration

    c. Ambition

    d. Honesty

    e. Reliability

    f. Sincerity

3. Combined personality and character assets
    a. Alertness
    b. Cheerfulness
    c. Cooperation
    d. Enthusiasm
    e. Industry
    f. Initiative
    g. Loyalty
    h. Orderliness
    i. Patience
    j. Tact
    k. Poise
    l. Open-mindedness

II. Sales Techniques

A. Be prepared

1. Have merchandise in readiness - arranged attractively, dusted, properly marked
2. Be familiar with store's promotion for the day - radio and television commercials, window and interior displays
3. Have adequate change in register
4. Have sales book in order with pencil or pen handy

B. Basic steps in selling

1. Approach

    a. Must be prompt

    b. Must be friendly and courteous

        (1) Show interest in the customer by manner and voice

        (2) Avoid familiarity - do NOT use such words as "dear," "dearie," "honey," "Mac," etc.

    c. Must be interesting - don't use stereotyped phrases

    d. Must be appropriate. The approach should be appropriate to the store, and also to the customer. (You should not greet a teen-age boy and an 80 year old lady in the same manner.)

2. Determine the customer's needs and desires

    a. Pay attention to customer

        (1) what he says

        (2) what his dress and manner tell about him

    b. Ask questions, but avoid too many questions at once. Remember this is not an inquisition.

        (1) "Is it for you?"

        (2) "What color would you like?"

        (3) "What size?" "What style?"

    c. Watch customer's reactions to

        (1) the merchandise you show

        (2) what you say

3. Show or demonstrate the merchandise

   a. Prepare in advance

      (1) have tools needed for display

      (2) knows features and benefits to show

      (3) know uses and care or service of the merchandise

      (4) know suitable substitutes

   b. Encourage customer participation

      (1) explain benefits (sell the "sizzle," not the steak)

      (2) show the customer

      (3) let the customer feel, try, touch the product

      (4) point out hidden features

   c. Use showmanship: dramatize your evidence

      (1) develop curiosity

         (a) by telling about it

         (b) by showing it in use

      (2) show admiration

         (a) by careful handling

         (b) by pointing out fine workmanship

         (c) by comparison with a less expensive item (however, do not condemn the less expensive merchandise; you may sell it!)

4. Answer customer questions and objections

   a. Speak with authority

      (1) Confidence comes with product knowledge.

      (2) Hesitancy denotes lack of knowledge and inability to sell.

      (3) Exaggeration or false claims will cause distrust.

      (4) Let the product talk; the salesperson demonstrates.

      (5) Enthusiasm is the result of familiarity with the product.

   b. Repeat your selling points

      (1) Restate selling points that interest customer. Repetition brings conviction.

      (2) Furnish evidence to support your claim.

         (a) written guarantee

         (b) demonstrate the feature

         (c) show product in action

   c. Welcome resistance

      (1) Types of resistance

         (a) Customer does not understand purpose and use of the product.

         (b) Customer is irritated with previous salesperson or present salesperson.

         (c) Customer is suspicious of product, store, or salesperson.

         (d) Customer has misconception of a feature of the product.

         (e) Customer is not aware of need.

         (f) Customer feels price is not justified.

        - (g) Customer is not convinced.
    - (2) How to answer objections
        - (a) Ask the customer to state or explain the objection.
        - (b) Repeat the objection so the customer will know that it is understood.
        - (c) Graciously indicate your pleasure in his interest at the point of concern, so that you can re-emphasize the salable point of the objection.
        - (d) Base the sale on the objection.
        - (e) Demonstrate product again, pausing long enough to determine customer satisfaction.
        - (f) Anticipate objections before they arise.

5. Closing the sale
    - a. Listen and watch for buying signals.
        - (1) Any favorable comment about the product.
        - (2) Undivided attention from customer indicates he is still interested.
    - b. Get customer to say yes
        - (1) Through a series of comments
        - (2) By reviewing selling points and benefits
    - c. Help customer make decision
        - (1) Offer choice, if possible, between two products, or between cash or charge.
        - (2) Remind customer of service, care, use, or satisfaction.
        - (3) Prompt customer by complimenting his decision to buy.

6. Suggesting additional merchandise (related selling)

   a. Ask customer about related merchandise. Show why related merchandise will enhance the first item of purchase.

   b. Mention unusual buys in store.

      (1) bargains for today

      (2) special purchase items

      (3) new products

   c. Show items; don't suggest them.

7. Follow-up

   a. Total sales ticket quickly but accurately.

   b. Count change back to customer using proper procedure. (Start with amount of sale and count up to amount paid by customer; i.e., if customer's purchase is $1.75 and he pays with a $5 bill, the salesman will count back to the customer: $1.75, $2.00, $3.00, $4.00, $5.00.)

   c. If the sale is made on credit, ask for customer's charge plate or other identification, and indicate credit sale on sales ticket.

   d. Bag, box, or wrap merchandise carefully and with pride.

   e. Assure customer that he has made a wise decision.

   f. Thank the customer, be cordial, and invite his return.

## III. Understanding the Consumer

### A. Importance of the Consumer

Your livelihood as a salesman depends upon your effectiveness in working with the consumer. The financial success of your company depends upon the satisfaction it gives the consumer. In fact, the welfare of our entire economy is dependent upon the satisfaction of the needs and desires of the consumer. No value is added to our economy, nor is any money really made by anyone until the product is sold.

To be successful in selling, therefore, you must understand the consumer, his wants, needs, buying motives, and personality type. You must recognize that the "consumer is king." Satisfied customers return and encourage their friends to return. Increased sales means increased profits. Increased profits could mean higher wages for you.

## B. Why Customers Buy

Customers buy for many, many reasons, and they buy different products or services from different retailers for different reasons at different times. There are no two customers who are exactly alike, and any one customer may act differently from one day to another. Each customer must be treated as an individual each time you approach him.

A "motive" is a drive or urge to do something that will result in satisfaction to the person. A motive becomes a "buying motive" when the person is willing to buy a product or service to satisfy a need or want. Buying motives may be classified as:

1. Rational buying motives - based on reason and careful thought, customer buys to satisfy a need, deliberately and for logical reasons; some examples of rational buying motives include:
    a. economy - comparatively inexpensive; less expensive to use or operate
    b. durability - has comparatively longer life; resists wear for longer period
    c. reliability - less subject to malfunctions and repairs
    d. utility - useful; satisfies a need
2. Emotional buying motives - usually less time and thought are given to the purchase; the customer is often driven by an emotion to make a purchase; some examples include:
    a. pride - high opinion of one's personal worth or possessions
    b. affection - fondness or love for another person
    c. imitation - emulates or copies what others are doing
    d. rivalry - desire to "keep up with the Joneses"
    e. fear - feeling of concern or anxiousness
    f. desire for comfort - desirous of making life easier
    g. sociability - feeling of need for companionship or friendliness; desire to be accepted by one's peers

3. Patronage motives - motives which influence the customer to buy from a particular store or supplier: examples are:

   a. price

   b. convenience

   c. accessibility

   d. store policies on credit, returns, guarantees

   e. courtesy of store personnel

Usually a customer will buy for a combination of motives. It is rare that any one of these motives, alone, will cause a customer to buy. For example, *pride* of ownership and *affection* for his family may influence a man to build a new house for his family. But he may choose brick construction because of its *durability*. He may buy the construction materials from a particular supplier because of the *price* and the supplier's *accessibility*.

C. Customer Types

A customer can usually be influenced to buy if he is treated as he likes to be treated. To know "how" he wants to be treated, you must be familiar with his type of personality. Several typical personality types include:

1. The *impulsive* customer - buys on impulse or emotion; is usually hurried; doesn't like to be stalled or delayed.

2. The *undecided* customer - has difficulty in making a decision; needs assistance in buying; a wide range in selection only confuses him more.

3. The *deliberate* customer - is slow and thorough in buying; wants all of the facts; must be totally convinced; doesn't want to be hurried.

4. The *argumentative* customer - is prone to argue with everything the salesperson says, may question the knowledge and expertness of the salesperson; must be made to think that he is "selling himself."

5. The *friendly* customer - is usually talkative; may tend to lead or sidetrack the conversation; may be more interested in a friendly conversation than in buying.

6. The *decisive* customer - has his mind made up before he comes into the store; knows exactly what he wants; resents high-pressure sales talk; must decide for himself.

7. The *silent* customer - rarely asks questions; may appear timid or unsure of himself; is usually totally unresponsive; prefers the reserve type of salesperson - someone who is not "over-powering."

8. The *nervous* customer - appears hurried and/or agitated; little things distract his attention; may be unsure of himself; needs patient assistance.

9. The *child* - requires special individual attention; children are the future regular customers of the company - cultivate their respect and confidence.

10. The *elderly* - requires special individual attention; may be childlike in mannerism; need to cultivate his respect and confidence.

Regardless of the type of customer or his motives for buying, each customer must be made to feel that *he* has made the final decision - that he *bought;* he was not *sold*!

## IV. Self-Analysis and Growth

### A. Listening

1. Do you pay close attention to what the customer says?

2. Are you careful to convey the impression that you are listening to the customer by looking at him with interest? By responding to his remarks?

3. Do you listen carefully to instructions, advice, and suggestions from supervisors?

### B. Adapting

1. Are you willing to help a person when you know he is not going to buy anything from you?

2. Do you constantly strive to adapt your manner and behavior to the standards and customs of your company and your community?

3. Do you work at improving your dress and grooming so that you will make the best possible impression on customers, fellow employees, and the public?

4. Broad interests, open-mindedness, and tolerance of different people are great helps in selling. Do you try to widen your horizons so that you will develop these qualities?

5. Do you repeatedly try to overcome your faults? Do not try not to be over-aggressive, over-talkative, unfriendly, timid, bored or disinterested, unkind, haughty, superior, or lazy?

C. Conveying Ideas

Ideas are conveyed by words and other means such as gestures, manner, tone.

1. Do you strive to improve your speech-vocabulary, tone of voice, inflection, pronunciation, enunciation, volume?
2. Do you try to convey to the customer by your manner that you respect him?
3. Do you show your respect and liking for your merchandise by the way in which you handle it?

D. Observation and Study

1. Are you careful to observe the selling techniques of successful salespersons in your own firm and in others?
2. Do you make it a practice to read articles and books on salesmanship?
3. Do you avail yourself of courses offered in selling?
4. Do you constantly try to increase your knowledge of the merchandise or service you sell from
   - (a) manufacturer's or company's information
   - (b) comparison with similar merchandise or service
   - (c) handling and use of your merchandise
   - (d) books and articles on the subject?
5. Do you try to learn as much as you can about psychology?

# PERSONAL SELLING SKILLS

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Teaching Time: 6 weeks

## MATH FOR MARKETING

## UNIT OUTLINE

I. Math Pretest

II. Salary Computations

III. Cash Register Operation
    A. Tax Computation
    B. Making Change
    C. Proving Cash

IV. Calculating Prices
    A. Mark up
    B. Mark down
    C. Open to buy

V. Discounts
    A. Cash Discounts
    B. Trade Discounts
    C. Quantity Discounts

**GENERAL PURPOSE:** To prepare the student to master the mathematical skills necessary to perform within the areas of marketing and distribution.

UNIT: **Math for Marketing**

| CONTENT AND ESSENTIAL LEARNING | BEHAVIORAL OBJECTIVES | PROCEDURES AND LEARNING ACTIVITIES | RELATED RESOURCES |
|---|---|---|---|
| I. Math Pretest | Given a teacher-developed test on the basic mathematical functions, the student will be able to perform all basic functions of addition, subtraction, multiplication, division, simple fractions, and percentages with 100% accuracy. | (T) 1. Review through examples on the board and through handouts those skills of addition, subtraction, division, multiplication, fractions, and percentages.<br>(S) 2. Complete a practice test for each of the basic mathematical functions. Check your answers.<br>(T) 3. Provide additional instruction on those functions where students are having the most trouble. | *Mathematics Skill Builder* |
| II. Salary Computations | Given classroom discussion, the student will be able to explain and compute straight salary, straight commission, draw plus commission, gross pay, and net pay with 85% accuracy. | (T) 1. Discuss the meaning of straight salary, straight commission, draw plus commission, gross pay, and net pay.<br>(T) 2. Present examples of each by working them on the board.<br>(S) 3. Work problems containing each of the types of salaries. | *Retailing: Principles and Practices*, pp. 21-25 |

| CONTENT AND ESSENTIAL LEARNING | BEHAVIORAL OBJECTIVES | PROCEDURES AND LEARNING ACTIVITIES | RELATED RESOURCES |
|---|---|---|---|
| | Given an example of gross pay and fringe benefits, the student will be able to compute and complete the parts of a paycheck stub with 95% accuracy. | (T) 1. Explain the paycheck stub and how each part is computed.<br>a) Gross pay<br>b) Net pay<br>c) Federal withholding<br>d) State withholding<br>e) Other deductions | *Mathematics Skill Builder,* pp. 129-132 |
| III. Cash Register Operation<br>A. Tax Computation<br>B. Making Change<br>C. Proving Cash | Given instruction in the operation of a cash register, the student will be able to compute the current amount of South Carolina sales tax for an item, make change, and fill out a daily balance slip for the cash register with 95% accuracy. | (T) 1. Distribute and explain the current South Carolina Sales Tax Chart and the breaks. | *South Carolina Sales Tax Chart* |
| | | (T) 2. Review percentages and decimals. | *Mathematics Skill Builder,* pp. 103-104, 125-128 |
| | | (S) 3. Calculate South Carolina sales tax using examples provided by the teacher. | |
| | | (T) 4. Explain and demonstrate how to make change using the cash register. | *The Cashier,* pp. 18-21 |
| | | (S) 5. Practice making change on paper and on the register. | *Mathematics Skill Builder,* pp. 25-26 |
| | | (T) 6. Distribute a teacher-developed test to assess the student's knowledge of the procedure. | |
| | | (T) 7. Demonstrate how the register is proven, over, or short. | *The Cashier,* pp. 22-24, 29-30 |

**UNIT:** **Math for Marketing**

| CONTENT AND ESSENTIAL LEARNING | BEHAVIORAL OBJECTIVES | PROCEDURES AND LEARNING ACTIVITIES | RELATED RESOURCES |
|---|---|---|---|
| | | (T) 8. Explain and fill out a daily balance form.<br>(S) 9. Practice filling out a daily balance form. | |
| IV. Calculating Prices<br>A. Mark up<br>B. Mark down<br>C. Open to Buy | Given a teacher-developed test, the student will be able to compute the mark up, mark down, and open to buy of selected items with 75% accuracy. | (T) 1. Demonstrate the calculation of mark up, mark down, and open to buy types of pricing.<br>(S) 2. Practice computing the types of pricing through examples provided by the teacher. | *Retailing: Principles and Practices*, pp. 558-563 |
| V. Discounts<br>A. Cash Discounts<br>B. Trade Discounts<br>C. Quantity Discounts | Given instruction on the three kinds of discounts, the student will be able to compute cash discounts, trade discounts, and quantity discounts with 80% accuracy. | (T) 1. Define and explain the three types of discounts.<br>(T) 2. Demonstrate the calculation of cash discounts, trade discounts, and quantity discounts.<br>(S) 3. Practice computing the three types of discounts. | *Retailing: Principles and Practices*, pp. 587-588 |

## MATH FOR MARKETING

## BIBLIOGRAPHY

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*Sales Tax Chart.* Columbia, S. C.: South Carolina Tax Commission, 1982.

Teaching Time: 2 weeks

## PRODUCT AND SERVICE TECHNOLOGY

## UNIT OUTLINE

I. Product Information

II. Product Development
   A. Product Planning
   B. Stages of Product Development
   C. Product Life Cycle

III. Branding
   A. Purpose of Branding
   B. Types of Brands
   C. Strategies in Naming
   D. Characteristics of Brand Names

IV. Registration of Brands

V. Selling Points

VI. Packaging and Labeling
   A. Packaging and Its Functions
   B. Labeling

GENERAL PURPOSE: To explain the importance of product knowledge for sales success and the process involved in labeling, packaging, and patenting the product.

**UNIT:** **Product and Service Technology**

| CONTENT AND ESSENTIAL LEARNING | BEHAVIORAL OBJECTIVES | PROCEDURES AND LEARNING ACTIVITIES | RELATED RESOURCES |
|---|---|---|---|
| I. Product Information | Given classroom discussion on product and service technology, the student will be able to list at least five reasons for its importance to sales employee, name nine areas of product knowledge and describe each, and list at least five sources of product information with 90% accuracy. | (T) 1. Define product and service technology. | *Know Your Merchandise*, pp. 1-2<br>*Selling: Principles and Practices*, pp. 159-162<br>*Basic Selling*, p. 39 |
| | | (T) 2. Discuss reasons for its importance to the salesperson. | |
| | | (T) 3. Discuss product knowledge areas and why every salesperson should be familiar with them. | *Selling: Principles and Practices*, pp. 162-170<br>*Basic Selling*, pp. 40-41 |
| | | (T) 4. Discuss the ways a salesperson can become better informed about the product. | *Selling: Principles and Practices*, p. 170<br>*Fundamentals of Selling*, pp. 174-175, 189<br>*Basic Selling*, p. 43<br>*Retailing: Principles and Practices*, pp. 174-176 |
| II. Product Development<br>A. Product Planning | Given a teacher-developed test, the student will be able to define major product terms and list at least three objectives for product planning with 100% accuracy. | (T) 1. Define product terms. | *Marketing: Principles and Practices*, pp. 140-142, 150 |
| | | (T/S) 2. Suggest five area businesses and have students suggest a new product that might be added to the product mix. | |
| | | (T) 3. Discuss product planning objectives. | *Marketing: Principles and Practices*, pp. 142-143, 150<br>*Fundamentals of Selling*, pp. 171-172 |
| | | (S) 4. Name new products to the area and discuss why they were introduced and predict the product's acceptance and/or non-acceptance. | |

| CONTENT AND ESSENTIAL LEARNING | BEHAVIORAL OBJECTIVES | PROCEDURES AND LEARNING ACTIVITIES | RELATED RESOURCES |
|---|---|---|---|
| B. Stages of Product Development | Following classroom discussion, the student will be able to list and describe the six steps of product development with 100% accuracy. | (T) 1. Discuss each of the six stages of product development.<br>(T/S)2. Discuss the importance of each stage. | *Marketing: Principles and Practices,* pp. 143-146 |
| C. Product Life Cycle | Given necessary information, the student will be able to define the Product Life Cycle (PLC) and draw a graph of the PLC with 100% accuracy | (T) 1. Define Product Life Cycle.<br>(T) 2. Distribute sample graph and explain stages.<br>(S) 3. Choose several products and decide their position on the graph. | *Marketing: Principles and Practices,* pp. 146-148 |
| III. Branding<br>A. Purpose of Branding | Following a classroom discussion on the purpose of branding, the student will be able to list three reasons for brand importance with 100% accuracy. | (T) 1. Discuss the importance of brands.<br>2. Compile a list of popular phrases and slogans, omitting the brand name. Have students fill in the name of the product. | *Marketing: Principles and Practices,* pp. 153-154<br>*Fundamentals of Selling,* pp. 176-177 |
| B. Types of Brands | Given information on types of brands the student will be able to define the brand, brand name, and brand mark; differentiate between national and private brands and give examples of each; and make one statement on the advantages and disadvantages of each with 100% accuracy. | (T) 1. Discuss the terms relating to branding.<br>(T/S)2. Distribute and discuss a list of national brands for five different products. Have students give a corresponding private brand name. | *Fundamentals of Selling,* pp. 179-181<br>*Marketing: Principles and Practices,* pp. 151-153 |

| CONTENT AND ESSENTIAL LEARNING | BEHAVIORAL OBJECTIVES | PROCEDURES AND LEARNING ACTIVITIES | RELATED RESOURCES |
|---|---|---|---|
| | | (T) 3. Distribute pictures of well-known brand marks and discuss identification based on recognition.<br>(S) 4. Compile a list of national brands and private brands sold at job training station. | |
| C. Strategies in Naming | Following classroom discussion, the student will be able to make five statements concerning the methods used in naming products with 90% accuracy. | (T) 1. Discuss brand name strategies through the use of family brand, product line names, separate names, price line names, and fighting brand.<br>(T/S) 2. Distribute handout with different strategies used and have students give example products of each. | *Marketing: Principles and Practices,* pp. 154-156<br>*Fundamentals of Selling,* p. 177 |
| D. Characteristics of Brand Names | Following classroom discussion, the student will be able to list and describe three characteristics of brand names with 100% accuracy. | (T) 1. Discuss characteristics in selecting brand names. | *Fundamentals of Selling,* p. 178<br>*Marketing: Principles and Practices,* p. 156 |
| IV. Registration of Brands | Following teacher instruction, the student will be able to describe the importance of registering a trademark and define the four different trademarks used by the U.S. Patent Office with 100% accuracy. | (T) 1. Define and discuss a trademark and its purpose.<br>(T) 2. Discuss how trademarks are registered with U.S. Patent Office and why.<br>(T/S) 3. Bring magazines to class and have students locate trademarks. | *Marketing: Principles and Practices,* pp. 156-158<br>*Fundamentals of Selling,* p. 178 |

**UNIT:** Product and Service Technology

| CONTENT AND ESSENTIAL LEARNING | BEHAVIORAL OBJECTIVES | PROCEDURES AND LEARNING ACTIVITIES | RELATED RESOURCES |
|---|---|---|---|
| V. Selling Points | Following teacher instruction, the student will be able to complete a product analysis worksheet with 85% accuracy. | (T) 1. Define sales feature, customer benefits, and product analysis. | *Selling: Principles and Practices,* pp. 171-179<br>*Basic Selling,* pp. 44-99<br>*Fundamentals of Selling,* pp. 195-200<br>*Retailing: Principles and Practices,* pp. 172-174 |
| | | (T/S) 2. Distribute and discuss correct and incorrect sales presentations using established selling points. | |
| VI. Packaging and Labeling<br>A. Packaging and its Functions | Given information on packaging, the student will be able to list four functions of the product package, identify the responsibility for packaging, and list the four types of materials used in packaging with 100% accuracy. | (T) 1. Discuss the functions of packaging. | *Fundamentals of Selling,* pp. 183-186<br>*Marketing: Principles and Practices,* pp. 160-162 |
| | | (T) 2. Discuss packaging responsibilities. | *Marketing: Principles and Practices,* p. 163 |
| | | (T) 3. Provide information on packaging materials and package forms. | *Marketing: Principles and Practices,* pp. 163-165<br>*Retailing: Principles and Practices,* pp. 230-231 |
| | | (S) 4. Compare several package forms and discuss their desirability by the consumer. | |
| B. Labeling | Given information on the kinds of labels, the student will be able to list and describe the four major kinds of labels with 100% accuracy. | (T) 1. Discuss the kinds of labeling. | *Fundamentals of Selling,* pp. 186-187<br>*Marketing: Principles and Practices,* pp. 166-167 |

**UNIT:** Product and Service Technology

| CONTENT AND ESSENTIAL LEARNING | BEHAVIORAL OBJECTIVES | PROCEDURES AND LEARNING ACTIVITIES | RELATED RESOURCES |
|---|---|---|---|
| | | (S) 2. Locate one example of each type of label and state why it is of that type.<br>(T) 3. Provide current information on packaging and labeling laws. | |

100

101

# PRODUCT AND SERVICE TECHNOLOGY

## BIBLIOGRAPHY

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Teaching Time: 2 weeks

## DISPLAY AND SALES PROMOTION

## UNIT OUTLINE

I. Introduction to Display

II. Elements of Display

III. Properties of Color and the Color Wheel

IV. Principles of Display

V. Display Planning

VI. Display Materials

VII. Installing a Display

**GENERAL PURPOSE:** To instruct the marketing and distributive education student in the areas of display through application and achievement of entry-level competencies.

| CONTENT AND ESSENTIAL LEARNING | BEHAVIORAL OBJECTIVES | PROCEDURES AND LEARNING ACTIVITIES | RELATED RESOURCES |
|---|---|---|---|
| I. Introduction to Display | Given classroom instruction and demonstration, the student will be able to identify and describe the five types of display with 90% accuracy. | (T) 1. Define display. Use as many illustrations as possible.<br>(T) 2. List and explain the jobs that displays accomplish.<br>(T) 3. Discuss the qualifications and opportunities that are necessary for a display specialist.<br>(S) 4. Observe ten displays in the community; use an approved rating sheet.<br>(T/S)5. Discuss findings of display ratings. Keep ratings for future reference. | *Retailing: Principles and Practices* (6th ed.), pp. 210-217<br>*The Display Specialist*, pp. 11-19<br>*Display* (LAP 217) |
| II. Elements of Display | Given classroom instruction and illustrations, the student will be able to identify the five basic patterns of display arrangements with 85% accuracy. | (T) 1. Explain the use of sizes, shapes, colors, and directions of display patterns.<br>(S) 2. Use magazines, photos, and texts to show the different types of elements.<br>(T/S)3. Discuss the pros and cons of the selected pictures. | *Retailing: Principles and Practices* (6th ed.), pp. 308-314<br>*The Display Specialist*, Chapter 3 |
| III. Properties of Color and the Color Wheel | Given a color wheel, the student will be able to identify the primary, secondary, and tertiary colors with 100% accuracy. | (T) 1. Describe the properties of color and discuss differences through examples.<br>(T) 2. Using the color wheel, point out the primary, secondary, and tertiary colors.<br>(T) 3. Describe how secondary and tertiary colors are formed. | *The Display Specialist*, pp. 25-26<br>*Retailing: Principles and Practices* (6th ed.), pp. 317-318 |

| CONTENT AND ESSENTIAL LEARNING | BEHAVIORAL OBJECTIVES | PROCEDURES AND LEARNING ACTIVITIES | RELATED RESOURCES |
|---|---|---|---|
| IV. Principles of Display | Given a teacher-developed test, the student will be able to describe the ten principles of display with 85% accuracy. | (T) 1. Discuss the principles of display.<br>a. Dominance<br>b. Repetition<br>c. Gradation<br>d. Contrast<br>e. Unity<br>f. Harmony<br>g. Scale<br>h. Proportion<br>i. Balance<br>j. Arrangement<br>(T/S)2. Using pictures and discussion, identify the principles of display. | *The Display Specialist,* pp. 31-34<br>*Retailing: Principles and Practices* (6th ed.), pp. 309-314 |
| V. Display Planning | Given a display schedule, the student will be able to develop the theme for five displays with 100% accuracy. | (T) 1. Define the theme using illustrations.<br>(T) 2. Explain display schedule and discuss its purpose.<br>(T) 3. Discuss appropriate themes of display.<br>a. Seasons<br>b. Holidays<br>c. Special events<br>(T) 4. Explain and demonstrate the most used props in display.<br>(T/S)5. Discuss and brainstorm techniques and ideas to use for areas in display (i.e., current events, fads, colors) | *Retailing: Principles and Practices* (7th ed.), pp. 378-384<br>*The Display Specialist,* pp. 44-45 |

| CONTENT AND ESSENTIAL LEARNING | BEHAVIORAL OBJECTIVES | PROCEDURES AND LEARNING ACTIVITIES | RELATED RESOURCES |
|---|---|---|---|
| VI. Display Materials | Given three displays, the student will be able to identify the props used in a display with 80% accuracy. | (T) 1. Explain what a prop is and how it can be used in a display. | *The Display Specialist,*<br>pp. 63-68, 78-88<br>*Retailing: Principles and Practices* (6th ed.), pp. 322-326 |
| | | (S) 2. Select a them for a display and locate the necessary props. | |
| | | (T) 3. Discuss the ways in which props can be developed, built, or purchased. | |
| | | (T/S)4. Investigate the different types of additional accessories that can be used in a display (i.e., signs, floors, floral arrangements, etc.). | |
| VII. Installing a Display | Given display information and teacher instruction, the student will be able to install a display with 80% accuracy using an original theme and individual planning. | (T) 1. Review the procedure and process in developing and installing a display. | *The Display Specialist,* pp. 91-103<br>*Display* (LAP 217)<br>*Retailing: Principles and Practices* (7th ed.), pp. 378-384 |
| | | (S) 2. Select a theme and gather the props. | |
| | | (S) 3. Construct a display on your own from beginning to finish. | |
| | | (S) 4. Complete a self-evaluation using an approved display rating sheet. | |
| | | (T/S)5. Compare and discuss the rating sheets used in the community and those used in the self-evaluation. | |

## DISPLAY AND SALES PROMOTION

## BIBLIOGRAPHY

*Color in Display.* Columbia, S. C.: South Carolina Department of Education. Office of Vocational Education, 1979.

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Teaching Time: 5 weeks

## ADVERTISING

## UNIT OUTLINE

I. Introduction to Advertising

II. Benefits and Advantages of Advertising

III. Types of Advertising

IV. Classifications of Advertising

V. Advertising Media
   A. Selecting the Best Media
   B. Types of Media
      1. Printed Media
      2. Broadcast Media

VI. Ratings of Broadcast Media

VII. Understanding the Printed Ad
   A. Kinds of Layout
   B. Elements of the Advertisement

VIII. Creating the Printed Ad
   A. Understanding Principles of Design
   B. Psychology of Advertising
   C. Preparing the Layout

IX. Evaluating an Ad

X. Careers in Advertising

**ENERAL PURPOSE:** To inform the marketing and distributive education student about the areas of the advertising field and the basic information needed to prepare that student for entry-level employment.

111

**UNIT:** Advertising

| CONTENT AND ESSENTIAL LEARNING | BEHAVIORAL OBJECTIVES | PROCEDURES AND LEARNING ACTIVITIES | RELATED RESOURCES |
|---|---|---|---|
| I. Introduction to Advertising | Following teacher discussion, the student will be able to define advertising and to state facts on advertising background growth, and its part in the marketing function. The student will be able to list four of the five purposes of advertising. | (T) 1. Define advertising.<br>(T) 2. Handout and discuss "What Is Advertising?"<br>(T) 3. Discuss historical background growth of advertising and its part in the marketing function.<br>(T) 4. Distribute and discuss "Purposes of Advertising." | *Advertising (D.E. Manual)*, pp. 1-3<br>*Advertising: Planning and Techniques*, pp. 1-5<br>*Selling: Principles and Practices*, pp. 376-381<br>*Retailing: Principles and Practices*, p. 208<br>*Advertising Services*, pp. 2-4<br>*Advertising* (LAP 1, No. 011-A)<br>*Marketing: Principles and Practices*, p. 291<br>*Fundamentals of Selling*, p. 408 |
| II. Benefits and Advantages of Advertising | Following teacher instruction, the student will be able to state two consumer benefits from advertising, two sales personnel benefits and two retailer advantages of advertising. | (T) 1. Provide students with information on benefits and advantages of advertising. | *Retailing: Principles and Practices*, pp. 204-206<br>*Selling: Principles and Practices*, pp. 386-389<br>*Fundamentals of Selling*, p. 407 |
| III. Types of Advertising | Following teacher information, the student will be able to identify the difference between motional and institutional advertising examples with 100% accuracy. | (T) 1. Define promotional (product) advertising. Show examples of this type of advertising. | *Retailing: Principles and Practices*, pp. 206-208<br>*Advertising*, p. 2<br>*Marketing in Action*, p. 293<br>*Selling: Principles and Practices*, pp. 381-383<br>*Advertising Services*, pp. 72-89<br>*Marketing: Principles and Practices*, p. 300<br>*Fundamentals of Selling*, p. 408<br>*Advertising* (LAP I, No. 001-A) |

| CONTENT AND ESSENTIAL LEARNING | BEHAVIORAL OBJECTIVES | PROCEDURES AND LEARNING ACTIVITIES | RELATED RESOURCES |
|---|---|---|---|
| | | (T) 2. Define institutional advertising. Provide examples of this type of advertising.<br>(S) 3. Complete the "Checklist on Examples of Promotional and Institutional Advertising." | |
| IV. Classifications of Advertising | Following teacher instruction, the student will be able to identify examples of national, local, primary, selective, retail, cooperative, consumer, trade, and industrial advertising from newspapers and magazines with 90% accuracy. | (T) 1. Discuss and define national, local, primary, selective, retail, cooperative, consumer, trade, and industrial advertising.<br>(T) 2. Exemplify each type of ad by showing newspapers and magazines that contain examples of each.<br>(S) 3. Name type of ad when shown. Find examples without teacher assistance. | *Marketing In Action*, pp. 286-289<br>*Advertising*, pp. 4-5<br>*Advertising Services*, pp. 5-11<br>*Marketing: Principles and Practices*, pp. 295, 300-303 |
| V. Advertising Media<br>A. Selecting the Best Media | Following teacher instruction, the student will be able to list five general groups of advertising media and state one example of each with 100% accuracy. The student will be able to discuss media planning and identify current media trends. | (T) 1. Discuss channels of advertising available, factors in media planning, and media trends.<br>(S) 2. List the five general groups available and state examples of each. | *Advertising (D.E. Manual)*, pp. 37-43<br>*Marketing in Action*, pp. 306-309<br>*Marketing: Principles and Practices*, p. 306-307<br>*Fundamentals of Selling*, pp. 410-413 |

| CONTENT AND ESSENTIAL LEARNING | BEHAVIORAL OBJECTIVES | PROCEDURES AND LEARNING ACTIVITIES | RELATED RESOURCES |
|---|---|---|---|
|  |  | (S) 3. Consult employer (or other business person) with regard to the following.<br>a) Different media used in training station for advertising<br>b) Who determines which media to use and what decisions are made about selecting various media<br>c) How results on various media are tabulated in order to determine effectiveness<br>d) Whether outside agencies or published reports are used to help select media |  |
| B. Types of Media | Following teacher instruction, the student will be able to define and give examples of all types of available media. Given the percentages of use on the media chart, the student will be able to label the correct media on the chart with 100% accuracy. | (T) 1. Distribute and discuss the supplement on basic outline of types of media. Have students complete the outline during the discussion.<br>(T) 2. Provide chart with the distributed percentages of use of media in advertising. | *Advertising*, pp. 19-26<br>*Marketing in Action*, pp. 310-327<br>*Advertising: Planning and Techniques*, pp. 72-73<br>Supplement 1<br>*Marketing: Principles and Practices*, p. 309 |

**UNIT:** Advertising

| CONTENT AND ESSENTIAL LEARNING | BEHAVIORAL OBJECTIVES | PROCEDURES AND LEARNING ACTIVITIES | RELATED RESOURCES |
|---|---|---|---|
| 1. Printed Media | Given a list of types of newspapers, the student will be able to name two advantages and two disadvantages of newspaper advertising and compute three problems relating to advertising rate structure with 75% accuracy. | (T) 1. Supply students with information on the types of newspapers that use advertising.<br>(T) 2. Provide information on advantages and disadvantages.<br>(T) 3. Define agate line and milline rate.<br>(S) 4. Calculate problems using milline rates to determine best value of comparable newspapers. | *Introduction to Advertising,* pp. 19-23<br>*Advertising (D.E. Manual),* pp. 43-49<br>*Marketing in Action,* pp. 310-314<br>*Advertising Services,* pp. 42-52<br>*Advertising: Planning and Techniques,* pp. 53-55<br>*Marketing: Principles and Practices,* p. 311<br>*Fundamentals of Selling,* pp. 414-419 |
|  | Given five types of advertising best served by business and consumer magazines, the student will be able to name one magazine in each area and list two advantages and two disadvantages of magazine advertising. | (T) 1. Discuss the types of business and consumer magazines. | *Introduction to Advertising,* pp. 24-30<br>*Marketing in Action,* pp. 314-317<br>*Advertising, (D.E. Manual),* pp. 51-56<br>*Selling: Principles and Practices,* pp. 383-384<br>*Advertising,* p. 21<br>*Marketing: Principles and Practices,* pp. 311-312<br>*Fundamentals of Selling,* pp. 420-425 |

| CONTENT AND ESSENTIAL LEARNING | BEHAVIORAL OBJECTIVES | PROCEDURES AND LEARNING ACTIVITIES | RELATED RESOURCES |
|---|---|---|---|
| | | (T) 2. Discuss advantages and disadvantages of magazine advertising. | |
| | | (S) 3. Acquire copies of two popular consumer magazines and discuss the following about each one.<br>a) Reading life<br>b) Audience appeal<br>c) General types of advertising | |
| 2. Broadcast Media | Given the advantages and disadvantages of radio advertising, the student will be able to list and describe at least two advantages and two disadvantages of radio use in advertising and relate these to radio cost. | (T) 1. Supply students with advantages and disadvantages of radio advertising. | *Advertising, (D.E. Manual),* pp. 65-69<br>*Selling: Principles and Practices,* p. 384<br>*Advertising,* pp. 22-23<br>*Marketing in Action,* pp. 322-324<br>*Advertising: Planning and Techniques,* p. 73, 77<br>Supplement 2<br>*Marketing: Principles and Practices,* p. 312<br>*Fundamentals of Selling,* p. 442 |
| | | (T) 2. Discuss how radio costs for advertisers are determined. | |
| | | (T) 3. Compare radio advertising to other media. | |
| | | (T) 4. Invite guest speaker from local radio station to come to discuss advertising campaigns, procedures, and costs. | |

| CONTENT AND ESSENTIAL LEARNING | BEHAVIORAL OBJECTIVES | PROCEDURES AND LEARNING ACTIVITIES | RELATED RESOURCES |
|---|---|---|---|
| | | (T) 5. Arrange for students to view taping of radio commercial.<br>(S) 6. Listen to the radio for an hour and record the items listed on the supplement. | |
| | Given the advantages and disadvantages of television advertising, the student will be able to list and describe at least two advantages and disadvantages of television advertising and relate these to television advertising costs. | (T) 1. Provide information on advantages and disadvantages of television advertising. | *Advertising*, pp. 23, 26<br>*Selling: Principles and Practices*, p. 384<br>*Marketing in Action*, pp. 318-322<br>*Advertising (D.E. Manual)*, pp. 57-59, pp. 61-62<br>*Advertising, Planning and Techniques*, pp. 79-80<br>*Marketing: Principles and Practices*, pp. 312-315<br>*Fundamentals of Selling*, pp. 442-443, 456<br>Supplement 3 |
| | | (T) 2. Provide students with current information on television advertising costs.<br>(T) 3. Invite a guest speaker from local television station to come to discuss advertising development in the television media.<br>(T) 4. Arrange for a visit to television station to view taping of local television advertisement. | |

| CONTENT AND ESSENTIAL LEARNING | BEHAVIORAL OBJECTIVES | PROCEDURES AND LEARNING ACTIVITIES | RELATED RESOURCES |
|---|---|---|---|
| | | (T) 5. Secure copies of *Advertising AGE* for the students to review and discuss up to date expenses of largest advertisers.<br>(S) 6. Complete Supplement 3. | |
| VI. Ratings of Broadcast Media | Following teacher instruction, the student will be able to identify four rating services and their methods of rating. | (T) 1. Provide students with information pertaining to research and evaluation of the broadcast media. | *Advertising (D.E. Manual),* pp. 60-61<br>*Introduction to Advertising,* pp. 31-34<br>*Fundamentals of Selling,* pp. 450-451 |
| VII. Understanding the Printed Ad<br>A. Kinds of Layout | Given ten layout plans, the student will be able to name and identify four types of layout plans, and list and identify all parts of the printed ad with 100% accuracy. | (T) 1. Provide students with information on layout plans.<br>(S) 2. Select magazine ads and newspaper ads and find one example of each type of plan.<br>(T) 3. Provide information on the elements of an ad.<br>(S) 4. Label each part of an ad supplied by the teacher. | *Introduction to Advertising,* pp. 40-42<br>*Retailing: Principles and Practices,* p. 531<br>*Advertising,* p. 55 |

| CONTENT AND ESSENTIAL LEARNING | BEHAVIORAL OBJECTIVES | PROCEDURES AND LEARNING ACTIVITIES | RELATED RESOURCES |
|---|---|---|---|
| B. Elements of the Advertisement | Given three layout plans, the student will be able to identify the headlines and create two headlines with 100% accuracy. | (T) 1. Define headline. Explain the purpose and importance of headlines. | *Retailing: Principles and Practices,* pp. 524-525<br>*Advertising,* pp. 36-41<br>*Advertising: Planning and Techniques,* pp. 35-38<br>*Advertising Services,* p. 99<br>*Introduction to Advertising,* p. 41 |
| | | (T) 2. Show examples of headlines in ads. | |
| | | (S) 3. Identify headlines in advertisements. | |
| | | (S) 4. Create headlines for a given product. | |
| | Given examples of the types of copy, the student will be able to identify the eight types with examples of each. The student will be able to write copy for a given product with 80% accuracy. | (T) 1. Supply students with information on the kinds of copy, how copy is to be developed, and its importance and purpose. | *Introduction to Advertising,* pp. 41-44<br>*Advertising (D.E. Manual),* pp. 85-92<br>*Retailing: Principles and Practices,* pp. 525-526<br>*Advertising: Planning and Techniques,* pp. 38-39<br>*Advertising,* pp. 33-35, 41-43<br>*Advertising Services,* pp. 99-100 |
| | | (S) 2. Look through magazines and newspapers to find examples of the eight kinds of copy given. | |
| | | (S) 3. Write copy for a given product. | |

| CONTENT AND ESSENTIAL LEARNING | BEHAVIORAL OBJECTIVES | PROCEDURES AND LEARNING ACTIVITIES | RELATED RESOURCES |
|---|---|---|---|
| | Following teacher instruction, the student will be able to state the purpose for using illustrations in advertising and how illustrations are achieved with 80% accuracy. | (T) 1. Provide students with definition of illustrations and the purposes of using illustrations in the printed media. Discuss the types of illustrations. | *Advertising: Planning and Techniques*, pp. 39-42<br>*Retailing: Principles and Practices*, pp. 526-529<br>*Advertising*, pp. 59-61<br>*Advertising (D.E. Manual)*, pp. 95-98<br>*Introduction to Advertising*, p. 41 |
| | | (S) 2. Examine magazine and newspaper advertisements to compare different types of illustrations. | |
| | Following teacher instruction, the student will be able to state the importance of using a logo in an advertisement, give its definition, and define trademark, slogan, and symbol with 100% accuracy. | (T) 1. Define logotype, trademark, slogan, and symbol. | *Advertising Services*, pp. 100-101<br>*Advertising: Planning and Techniques*, pp. 43-44<br>*Retailing: Principles and Practices*, p. 535<br>*Introduction to Advertising*, p. 41 |
| | | (T) 2. Provide students with information on relevance of use of logo in advertising. | |
| | | (S) 3. Compare different logos as they appear in print. | |
| | | (S) 4. Discuss slogans in broadcast media. | |
| | Following teacher instruction, the student will be able to state the importance of white space in a printed advertisement with 100% accuracy. | (T) 1. Provide students with definition and purpose of white space. | *Retailing: Principles and Practices*, p. 535<br>*Advertising Services*, p. 101<br>*Introduction to Advertising*, p. 41<br>*Advertising: Planning and Techniques*, p. 49 |
| | | (S) 2. Examine several advertisements on the use of white space. | |

| CONTENT AND ESSENTIAL LEARNING | BEHAVIORAL OBJECTIVES | PROCEDURES AND LEARNING ACTIVITIES | RELATED RESOURCES |
|---|---|---|---|
| | Following teacher instruction, the student will be able to identify the price in an ad and state the importance of its being used or not being used in advertising with 100% accuracy. | (T) 1. Discuss the importance of placing the price in an ad.<br>(S) 2. Look at different ads and compare the products that give the price with the products that don't use the price. | *Advertising: Planning and Techniques,* pp. 42-43 |
| | Following teacher instruction, the student will be able to state the purpose of using a border in printed advertisement with 100% accuracy. | (T) 1. Supply students with definition of a border and why it is used.<br>(S) 2. Look at different ads and compare the different styles of borders. | *Introduction to Advertising,* pp. 41-42<br>*Retailing: Principles and Practices,* p. 535<br>*Advertising: Planning and Techniques,* p. 49 |
| VIII. Creating the Printed Ad<br>A. Understanding Principles of Design | Given a list of the principles of design, the student will be able to define each principle that should be considered in creating an advertisement with 80% accuracy. | (T) 1. Discuss the principles of design, their definitions and their importance with the use of advertisements.<br>(S) 2. Examine advertisements to identify principles used. | *Advertising,* pp. 49-54<br>*Retailing: Principles and Practices,* pp. 535-536<br>*Advertising (D.E. Manual),* pp. 98-102 |
| B. Psychology of Advertising | Following teacher instruction, the student will be able to make three statements as to the importance of psychology and its relation to advertising. | (T) 1. Provide students with information on psychology as it relates to advertising.<br>(T) 2. Show and discuss the slide/tape presentation. | *Introduction to Advertising,* pp. 10-13<br>"Psychology of Advertising" (slide/tape) |

**UNIT:** Advertising

| CONTENT AND ESSENTIAL LEARNING | BEHAVIORAL OBJECTIVES | PROCEDURES AND LEARNING ACTIVITIES | RELATED RESOURCES |
|---|---|---|---|
| C. Preparing the Layout | Given the stages of a printed ad, the student will be able to define each step and identify the stages in the correct order. | (T) 1. Define and discuss the rough draft, thumbnail sketch, comprehensive and mechanical stages of the printed advertisements. | *Retailing: Principles and Practices,* pp. 532-533<br>*Advertising,* pp. 55-58<br>*Advertising, Planning and Techniques,* pp. 50-51<br>*Advertising Services,* pp. 102-103 |
| IX. Evaluating an Ad | Given the functions, development, and purposes of advertising using the printed ad, the student will be able to evaluate the ad with labels and write ten descriptive statements about the ad with 100% accuracy. | (T) 1. Supply the students with an ad checklist for evaluation purposes.<br>(T) 2. Provide the students with one ad to label and evaluate | *Advertising Services,* pp. 103-112<br>*Retailing: Principles and Practices,* pp. 536-537 |
| X. Careers in Advertising | Following teacher instruction, the student will be able to identify five jobs in the advertising field and describe each job's duties and responsibilities. | (T) 1. Invite speaker from advertising field to present information on job opportunities.<br>(T) 2. Invite guidance counselor to provide information from career center on job opportunities.<br>(T) 3. Give list of all job opportunities available in advertising field and job descriptions.<br>(S) 4. Interview person in advertising field and report to class. | *Advertising,* pp. 7-12<br>*Advertising Services,* pp. 12-19<br>*Advertising: Planning and Techniques,* pp. 7-9 |

Advertising
Supplement 1a

## OUTLINE HANDOUT TO BE COMPLETED BY STUDENT DURING DISCUSSION

I. Printed Media
  A.
  B.
  C.
    1.
    2.
    3.
    4.
    5.

II. Broadcast Media
  A.
  B.

III. Position Media
  A.
    1.
    2.
  B.
    1.
    2.
    3.

IV. Other Media
  A.
    1.
    2.
    3.
    4.
    5.
  B. Point of Purchase (covered under display unit)

## KEY TO SUPPLEMENT 1a

I. Printed Media
  A. Newspapers
  B. Magazines
  C. Direct Mail
    1. Post cards
    2. Leaflets
    3. Folders
    4. Booklets
    5. Catalogs

II. Broadcast Media
  A. Radio
  B. Television

III. Position Media
  A. Outdoor Advertising
    1. Billboards
  B. Transportation Advertising
    1. Car cards
    2. Traveling displays
    3. Station posters

IV. Other Media
  A. Specialty Advertising
    1. Calendars
    2. Pens, pencils
    3. Ashtrays
    4. Matches
    5. Rulers
  B. Point of Purchase (covered under display unit)

Listen to tne radio for an hour and record tne following information.

1. Name of station ______________________________
2. Time of listening ______________________________
3. Products being advertised ______________________________
4. Length of advertisements ______________________________

Summarize

1. Number of ads in an hour ______________________________
2. Types of products ______________________________
3. Total amount of time in an hour alloted to advertising ______________________________

## HANDOUT FOR TELEVISION ADVERTISING

**INSTRUCTIONS:** Watch television for an hour (preferably an hour long show). Answer the following questions about the program and the advertising.

1. Date and time of program ______________________________
2. Name of program ______________________________
3. Number of commercials ______________________________
4. Length of each commercial ______________________________
5. Types of products advertised ______________________________
6. Was the advertising local or national? ______________________________
7. Total amount of time taken from the hour program for advertisements ______________

# ADVERTISING

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**Audiovisuals**

"Psychology of Advertising," D. E. Visuals, Sunrise, Florida (80 color slides, 30 min. cassette)

Teaching Time: 3 weeks

## HUMAN RELATIONS SKILLS IN MARKETING

## UNIT OUTLINE

I. What Is Human Relations?

II. The Development of Human Relations

III. The Importance of Human Relations in Marketing

IV. Self-Understanding
    A. Importance of Good Self-image
    B. Personality Development
    C. Maslow's Hierachy of Needs
    D. Values
    E. Success
    F. Goals

V. Human Relations With Co-workers

VI. Human Relations With Employers

VII. Human Relations With Customers

**GENERAL PURPOSE:** To relate human relations to marketing and distributive education. Emphasis is placed on the development of self-understanding and how this reflects on success with employers, co-workers, and customers.

| CONTENT AND ESSENTIAL LEARNING | BEHAVIORAL OBJECTIVES | PROCEDURES AND LEARNING ACTIVITIES | RELATED RESOURCES |
|---|---|---|---|
| I. What Is Human Relations | Following teacher instruction, the student will be able to define human relations and list the four relationships one has as an employee of a business with 100% accuracy. | (T) 1. Define human relations. | *Fundamentals of Selling,* p. 231<br>*Retailing: Principles and Practices,* p. 105<br>*Retail Selling,* p. 100<br>*Human Relations at Work,* pp. 3-6<br>*Your Attitude Is Showing,* pp. 1-9 |
| | | (T) 2. Cite examples of good human relations and poor human relations. | |
| | | (T) 3. Describe the four relationships a student trainee must deal with. | |
| II. The Development of Human Relations | Following teacher instruction, the student will be able to explain how the human relations movement began and why with 100% accuracy. | (T) 1. Explain the Western Electric experiment as it relates to human relations development and growth. | *Human Relations at Work,* pp. 6-9 |
| III. The Importance of Human Relations in Marketing | Following teacher information, the student will be able to state with 100% accuracy three goals that explain the purpose of human relations in marketing and the importance of human relations on and off the job. | (T) 1. Explain the purpose of human relations in terms of goals. | *Human Relations in Marketing,* pp. 1-14<br>*Your Attitude Is Showing,* pp. 10-17<br>*Human Relations* (LAP 26, No. 309) |
| | | (T) 2. Explain the results of poor human relations and how they can affect an individual on and off the job. | |
| | | (S) 3. Complete the activity on evaluating human relations on and off the job. | |

UNIT: **Human Relations**

| CONTENT AND ESSENTIAL LEARNING | BEHAVIORAL OBJECTIVES | PROCEDURES AND LEARNING ACTIVITIES | RELATED RESOURCES |
|---|---|---|---|
| IV. Self-Understanding<br>A. Importance of Good Self-Image | Following teacher instruction, the student will be able to explain with 85% accuracy why good human relations come only through self-understanding. | (T) 1. Explain why self-understanding is essential to good human relations. | *Human Relations at Work,* pp. 14-23<br>*Working at Human Relations,* pp. 11-20<br>Supplement 1<br>*Human Relations* (LAP I, No. 302-A) |
| | | (T) 2. Define self-image. | |
| | | (S) 3. Complete Supplement I (Self-Analysis Rating Sheet) or any self-rating form supplied by the teacher. | |
| B. Personality Development | Given a list of personality traits, the student will be able to classify the traits according to physical, mental, and emotional qualities with 100% accuracy. The student will be able to analyze his/her own personality and list three points of weakness that need improvement to meet the requirements of a correct business personality. | (T) 1. Provide information on personality and its breakdown into physical, mental and emotional categories. | *Human Relations in Marketing,* pp. 15-32<br>*Personal Dynamics in Personality Development*, pp. 90-92<br>Supplement 2<br>*Human Relations* (LAP 6, No. 286-A) |
| | | (T) 2. Distribute handouts or worksheets for students to evaluate their personality and cite where improvements are needed. | |
| | | (S) 3. Complete worksheets and analyze personality strengths and weaknesses. | |

| CONTENT AND ESSENTIAL LEARNING | BEHAVIORAL OBJECTIVES | PROCEDURES AND LEARNING ACTIVITIES | RELATED RESOURCES |
|---|---|---|---|
| C. Maslow's Hierarchy of Needs | Given the pyramid diagram, the student will be able to identify and describe all levels of Maslow's Hierarchy of Needs with 100% accuracy. | (T) 1. Distribute handout of Maslow's Hierarchy and explain the levels.<br>(S) 2. Give examples of items that can satisfy each level. | *Human Relations in Marketing,* pp. 36-37<br>*Winning,* pp. 31-40<br>*Human Relations* (LAP 22, No. 283) |
| D. Values | Following a teacher-led discussion, the student will be able to define values and list the three reasons for values as they relate to justice with 100% accuracy. | (T) 1. Define values.<br>(T) 2. Discuss values as they relate to justice.<br>(S) 3. Complete Supplement 3.<br>(S) 4. Discuss "Lookout Mountain" and/or "Who Should Survive?" (or similar situations where values prevail).<br>(S) 5. Assess values through values assessment experiences. | *Human Relations at Work,* pp. 28-31, 52-56<br>*Human Relations in Marketing,* pp. 70-72<br>Supplement 3 |
| E. Success | Following a teacher-led discussion, the student will be able to make five statements on how success can be achieved in the marketing environment and list ten characteristics from the success pyramid with 100% accuracy. | (T) 1. Present information on positive self-image as it relates to success. | *Human Relations at Work,* pp. 31-38, 57-61<br>*Winning,* pp. 55-62<br>*Personal Dynamics in Personality Development,* pp. 93-95, 121-123<br>*Your Attitude is Showing,* pp. 51-59, 89-97<br>*Marilyn Vanderbur Motivational Film Series* |

**UNIT:** **Human Relations**

| CONTENT AND ESSENTIAL LEARNING | BEHAVIORAL OBJECTIVES | PROCEDURES AND LEARNING ACTIVITIES | RELATED RESOURCES |
|---|---|---|---|
| | | (T) 2. Present information as it relates to success and being liked by others.<br>(T) 3. Distribute success pyramid information.<br>(T) 4. Distribute handout on why people fail in life.<br>(T) 5. Show film on success and discuss.<br>(S) 6. Complete activities in which strengths and weaknesses are identified. | |
| F. Goals | Following teacher instruction, the student will be able to define a short-term goal and a long-term goal, and list the four guidelines for goal setting with 100% accuracy. | (T) 1. Define short and long-term goals.<br>(T) 2. List and discuss guidelines for goal setting.<br>(S) 3. Establish some short-term goals.<br>(S) 4. Establish some long-term goals. | *Human Relations at Work*, pp. 39-40, 62<br>*Winning*, pp. 63-74<br>*Personal Dynamics in Personality Development*, pp. 159-161 |
| V. Human Relations with Co-Workers | Following teacher information, the student will be able to state four techniques for getting along with co-workers with 100% accuracy. | (T) 1. Distribute and discuss information on the importance of getting along with co-workers and techniques needed. | *Human Relations at Work*, pp. 64-79<br>*Human Relations in Marketing*, pp. 67-70<br>*Retailing: Principles and Practices*, pp. 110-111 |

**UNIT:** Human Relations

| CONTENT AND ESSENTIAL LEARNING | BEHAVIORAL OBJECTIVES | PROCEDURES AND LEARNING ACTIVITIES | RELATED RESOURCES |
|---|---|---|---|
| VI. Human Relations with Employers | Given related information, the student will be able to list five character traits that employers expect from employees with 100% accuracy. | (T) 1. Discuss the personality traits that employers look for in employees.<br>(S) 2. Provide for class discussion some examples of employer-employee problems that need solutions. | *Human Relations at Work,* pp. 86-94<br>*Human Relations in Marketing,* pp. 37-45<br>*Retailing: Principles and Practices,* pp. 106-110<br>*Fundamentals of Selling,* pp. 232-234<br>*Retail Selling,* pp. 91-100 |
| VII. Human Relations with Customers | Following teacher instruction, the student will be able to make two statements on the importance of customers and their return to the business and list two guidelines for dealing with customers. | (T) 1. Provide information on the importance of customer relations and how to deal with customers in a business like manner.<br>(S) 2. Cite examples of customer problems and discuss possible solutions. | *Human Relations at Work,* pp. 104-121<br>*Human Relations* (LAP 28, No. 280), (LAP 29, No. 288) |

Human Relations
Supplement 1

## SELF-ANALYSIS RATING SCALE

Score each statement in the scale as follows:

4 points – (always) – excellent
3 points – (usually) – good
2 points – (sometimes) – fair
1 point – (rarely or never) – poor

______ 1. I am intelligent. I grasp instruction quickly and accurately. I comprehend directions instantly.

______ 2. I possess initiative. I attempt work beyond that required. I volunteer contributions to class or school activity. I am a leader in extracurricular affairs.

______ 3. I am dependable. I am reliable at all times; I do routine duties without being told; I am on hand when I am needed. I am reticent about confidential matters entrusted to me.

______ 4. I am punctual. I complete assignments on time and keep appointments on time.

______ 5. I am obedient. I observe the rules of my school, of my employer, and of my community.

______ 6. I cooperate with others. I work harmoniously in group activities. I consider the interest of group activities. I consider the interest of the group to be of paramount importance.

______ 7. I possess good judgment. I have good common sense. I distinguish the important from the unimportant in class work. I consider all phases of a situation before deciding on a course of conduct. Others ask my opinions and advice.

______ 8. I am tactful. I say and do the right thing when dealing with others.

______ 9. I am neat and clean. My person and attire are neat and clean. I keep my surroundings for which I am responsible neat and clean.

______ 10. I display good taste in attire. My grooming is in the best taste.

______ 11. I have habits of good posture. When I walk, sit, or stand, I create a favorable impression because of my bodily postures.

______ 12. I speak well. The words I speak and my enunciation create a favorable impression.

______ 13. I show consideration for others. In making decisions, I am mindful of the effect my future conduct will have on others.

______ 14. I am well-mannered. I show a refinement of manner and a natural grace in my contact with others.

______ 15. I am healthy. I am practically never ill.

______ 16. I have tireless energy. Even after a day's work, my energy is not exhausted.

______ 17. I am accurate. I get information correctly. I keep records properly and in order.

______ 18. I am speedy. I lose no time in doing my work. I get my work done quickly.

______ 19. I am honest. I do not tell falsehoods. I do not steal money, time, supplies, or ideas.

______ 20. I am adaptable. I turn from one task to another. I am not confused by changes. I adjust myself to people, places, and things.

______ 21. I have a good memory. I remember the names of persons, telephone numbers, and addresses. I remember facts and incidents that have a bearing on a question of the moment.

______ 22. I am industrious. I am happy when I am busy. I find work to do at all times.

______ 23. I am loyal. I feel strongly the ties that bind me to ideals, institutions, and to people, both those who depend upon me and those upon whom I depend.

______ 24. I have executive ability. I plan work with system and with efficiency, and I assign tasks to others with understanding. I manage people, and they like to work for me.

______ 25. I have businesslike attitudes. I realize the importance of the work to be done. I am not a "clock watcher." I realize the value of time and the importance of giving a day's work for a day's pay.

Human Relations
Supplement 2

## INVENTORY OF YOUR PERSONALITY

Name ______________________________ Date ______________________

Directions: This is an inventory of your personality. Each question is to be answered yes or no in the space provided. If you cannot honestly answer the question, put a question mark in the space. This survey is an effort to find out about You and Your individual qualities. Answer the questions honestly.

______ 1. Are you a good listener?

______ 2. Do you avoid being sarcastic?

______ 3. Can you always be depended upon to do what you say you will?

______ 4. Do you go out of your way cheerfully to help others?

______ 5. Do you hold grudges?

______ 6. Can you always trust yourself to handle money that does not belong to you?

______ 7. Do you tend to argue or disagree when someone gives his/her point of view about which you disagree?

______ 8. Do you avoid exaggeration in all your statements?

______ 9. Can you tackle a new job without instruction?

______ 10. Do you enjoy meeting people?

______ 11. Do you refrain from showing off how much you know?

______ 12. Do you feel at ease with associates?

______ 13. Do you avoid making fun of others behind their backs?

______ 14. Do you usually hate to see the other person promoted or get something you don't have?

______ 15. Are you easily discouraged?

______ 16. Do you tell people who have done you a favor that you appreciate it?

______ 17. Are you willing to devote extra time and effort to your work even though it means giving up some pleasure?

______ 18. Would you sooner quit a job than be "bawled out" by the employer?

______ 19. Can you take constructive criticism without being hurt?

______ 20. Do your friends ever trust you with their personal belongings?

______ 21. Are you anxious to get to work or start a new project which you know is going to take a long time?

______ 22. If a customer should call your attention to a mistake you had made in favor of the store, would you thank him/her?

______ 23. Are you punctual?

______ 24. Do you keep your clothes neat and tidy?

______ 25. Are you careful not to tell jokes that will embarrass those listening?

______ 26. Do you always control your temper?

______ 27. Do you avoid talking almost continuously?

______ 28. Do you loan things to others readily?

______ 29. Do you avoid flattering others?

______ 30. Do you avoid gossiping?

______ 31. Are you a faultfinder?

______ 32. Do you usually "Do unto others as you would have others do unto you."

______ 33. Have you ever "invited yourself" to visit or to go along with a group when an invitation was not forthcoming?

______ 34. Does the weather usually affect your disposition?

______ 35. Do you try to understand the reason for rules?

______ 36. Do you avoid asking favors of others?

______ 37. Do you have to be forced into a position of responsibility?

______ 38. Are you shy and backward?

______ 39. Can you find something good in people after you know them?

______ 40. Do you avoid trying to reform others?

______ 41. Do you keep your personal troubles to yourself?

______ 42. Do you always shift the blame to somebody else even when you know you are really guilty?

______ 43. Do you become impatient when a friend for whom you are waiting is late?

______ 44. Are you a "know it all" person who won't accept other people's advice?

______ 45. Do you avoid asking questions to keep up a conversation?

## RATING YOUR VALUES

DIRECTIONS: Read each block before rating. Mark out the male or female block that does not apply. Then rate the remaining values for yourself beginning with number one as the most important.

| | | | | |
|---|---|---|---|---|
| I VALUE BEING A MALE. | I VALUE BEING A FEMALE. | I VALUE BEING LIKED BY OTHERS. | I VALUE LOOKING GOOD. | I VALUE BEING FREE TO DO WHAT I WANT. |
| I VALUE BEING SUCCESSFUL. | | I VALUE DOING NEW THINGS. | I VALUE EXCITEMENT. | I VALUE BEING WITH MY FRIENDS. |
| I VALUE BEING ALONE. | | I VALUE BEING POPULAR. | I VALUE BEING SMART. | I VALUE SPORTS. |
| I VALUE MY FAMILY. | | I VALUE TELLING THE TRUTH. | I VALUE BEING HONEST. | I VALUE HAVING FUN. |
| I VALUE BEING LOVED. | | I VALUE BEING ABLE TO LOVE OTHERS. | I VALUE BEING HAPPY. | I VALUE BEING HEALTHY. |
| I VALUE MONEY. | | I VALUE RELIGION. | I VALUE ANIMALS AND THINGS IN NATURE. | I VALUE MAKING OTHERS HAPPY. |

## HUMAN RELATIONS SKILLS IN MARKETING

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*FILM*

*Marilyn Vanderbur Motivational Film Series.* Denver: Marilyn Vanderbur Motivational Institute, Inc., 1981. (The series of eight films may be obtained from School Services Unit, Room 803, Rutledge Building, State DEpartment of Education, Columbia, S. C. 29210 but must be requested by the high school guidance counselor.)

Teaching Time: 4 weeks

## MANAGEMENT SKILLS IN MARKETING

## UNIT OUTLINE

I. Personnel Organization

II. Policy-Making

III. Department Management

IV. Supervisory Techniques

V. Management Effectiveness/Leadership Theories

VI. Public/Human Relations

VII. Management Project

**GENERAL PURPOSE:** To develop an understanding of management and how to deal with management problems and/or personal relationships in the area of marketing and distribution employment.

**UNIT:** **Management Skills in Marketing**

| CONTENT AND ESSENTIAL LEARNING | BEHAVIORAL OBJECTIVES | PROCEDURES AND LEARNING ACTIVITIES | RELATED RESOURCES |
|---|---|---|---|
| I. Personnel Organization | Given a list of the types of organizations, the student will be able to describe each type with 70% accuracy. | (T) 1. Define personnel organization.<br>(T) 2. Describe, discuss and diagram the types of personnel organizations.<br>a. Line<br>b. Staff<br>c. Line and staff<br>(T) 3. Discuss the importance of a marketing plan for organization.<br>(S) 4. Define and discuss terms used in personnel organization.<br>(S) 5. Complete a teacher-prepared list on descriptions of each type. | *Marketing and Distribution,* pp. 460-466<br>*Marketing: Practices and Principles,* pp. 368-373<br>*Business Principles and Management,* pp. 572-587 |
| II. Policy-Making | After classroom instruction, the student will be able to demonstrate an understanding of policy-making by completing a case problem from the text with 70% accuracy. | (T) 1. Distribute and discuss handout on Managerial Do's and Don'ts and Managerial Functions.<br>(T) 2. Define and discuss the four functions of management.<br>a. Planning<br>b. Organizing<br>c. Leading<br>d. Controlling<br>(S) 3. Complete case problem 29-1 on morale and production from textbook. | *Business Principles and Management,* pp. 593-609 |

**UNIT:** **Management Skills in Marketing**

| CONTENT AND ESSENTIAL LEARNING | BEHAVIORAL OBJECTIVES | PROCEDURES AND LEARNING ACTIVITIES | RELATED RESOURCES |
|---|---|---|---|
| III. Department Management | Following classroom instruction, the student will be able to locate the areas on a managerial grid and use the grid to identify with 70% accuracy the type of management. | (T) 1. Distribute and discuss the styles of management grid.<br>a. Country club<br>b. Team<br>c. Middle of road<br>d. Impoverished<br>e. Task<br>(T/S)2. Using handout on managerial grid with the styles of management, discuss the distinguishing characteristics of each type.<br>(T) 3. Discuss the concepts of managing a department.<br>a. Selecting employees<br>b. Training employees<br>c. Promoting employees<br>(S) 4. Using a blank grid, complete and identify the styles of management. | *Business Principles and Management*<br>pp. 512-528<br>Supplement 1 |
| IV. Supervisory Techniques | Given classroom instruction, the student will be able to complete a series of managerial and supervisory problems using the DICE method of problem solving with 70% accuracy. | (T) 1. Define and explain the DICE method of problem solving emphasizing each step in the process.<br>a. Define problem<br>b. Identify solutions<br>c. Choose best solution<br>d. Evaluate how one solves problem | *Marketing in Action*, pp. 232-236 |

**UNIT:** Management Skills in Marketing

| CONTENT AND ESSENTIAL LEARNING | BEHAVIORAL OBJECTIVES | PROCEDURES AND LEARNING ACTIVITIES | RELATED RESOURCES |
|---|---|---|---|
| | | (T) 2. Distribute and discuss the theories of leadership by defining those theories.<br>a. Trait theory<br>b. Personal theory<br>c. Behavior theory<br>d. Situational theory | Supplement 2 |
| | | (T/S)3. Discuss and cite examples of the bases of power and how they relate to supervision.<br>a. Coercive power<br>b. Reward<br>c. Legitimate power<br>d. Expert power<br>e. Referent power | Supplement 3 |
| | | (T/S)4. Invite local managers and supervisors to class for a discussion and question/answer session on their techniques and uses of power. | |
| | | (S) 5. Complete supervisory situation problems using the DICE method of problem solving. | |

UNIT: **Management Skills in Marketing**

| CONTENT AND ESSENTIAL LEARNING | BEHAVIORAL OBJECTIVES | PROCEDURES AND LEARNING ACTIVITIES | RELATED RESOURCES |
|---|---|---|---|
| V. Management Effectiveness Leadership Theories | Given teacher instruction on leadership theories, the student will be able to identify the differing types of leadership theory by completing a teacher-developed test with 70% accuracy. | (T) 1. Using handout, discuss and cite examples of leadership theory and management.<br>(T) 2. Define and discuss personnel relations regarding these areas.<br>a. Compensation<br>b. Fringe benefits<br>c. Legal<br>(S) 3. Complete a teacher-prepared test on leadership theory.<br>(S) 4. Complete case problem 26-1 on scheduling and morale from text. | Supplement 4<br>*Business Principles and Management,* pp. 533-550 |
| VI. Public/Human Relations | Given three assignments on public/human relations the student will be able to complete the assignments. Each must be rated acceptable by the instructor. | (T) 1. Discuss and explain the importance of these terms.<br>a. Labor unions<br>b. Union objectives<br>c. Management objectives<br>d. Collective bargaining<br>e. Wage and hour laws<br>(S) 2. Define key terms from the material in the text and complete case problem 27-1 on human relations. | *Business Principles and Management,* pp. 555-571 |

**UNIT:** Management Skills in Marketing

| CONTENT AND ESSENTIAL LEARNING | BEHAVIORAL OBJECTIVES | PROCEDURES AND LEARNING ACTIVITIES | RELATED RESOURCES |
|---|---|---|---|
| VII. Management Project | Following instruction, the student will be able to demonstrate an understanding of concepts of going into business by submitting a detailed report and project work. The work must be rated acceptable by the instructor. | (T) 1. Detail the guidelines for "Going Into Business" project.<br>(T) 2. Outline the sections of the project required to be completed by students.<br>(S) 3. Select a business to "start" for the project. Each student should choose a different marketing business.<br>(S) 4. Working by sections and using provided guidelines, complete work on the project for starting your own business.<br>(T) 5. Assist students in solving problems and answering questions as they work on projects.<br>(S) 6. Submit a detailed written report on "Going Into Business" using the outline by sections presented. | Supplement 5 |

167

168

## THE MANAGERIAL GRID

The Managerial Grid identifies a variety of theories of managerial behavior. These theories are based on two ingredients. One is *concern for production*. The other is *concern for human relationships*.

Before going on, a word is needed about "concern for." This is not meant to indicate *how much* production is obtained nor is it intended to reflect the degree human relationship needs actually are met. Rather, emphasis here is placed on the *degree* of "concern for" because action is rooted in basic attitudes. Here, what is significant is how much a supervisor is *concerned* about *production* and how much about *human relationships*.

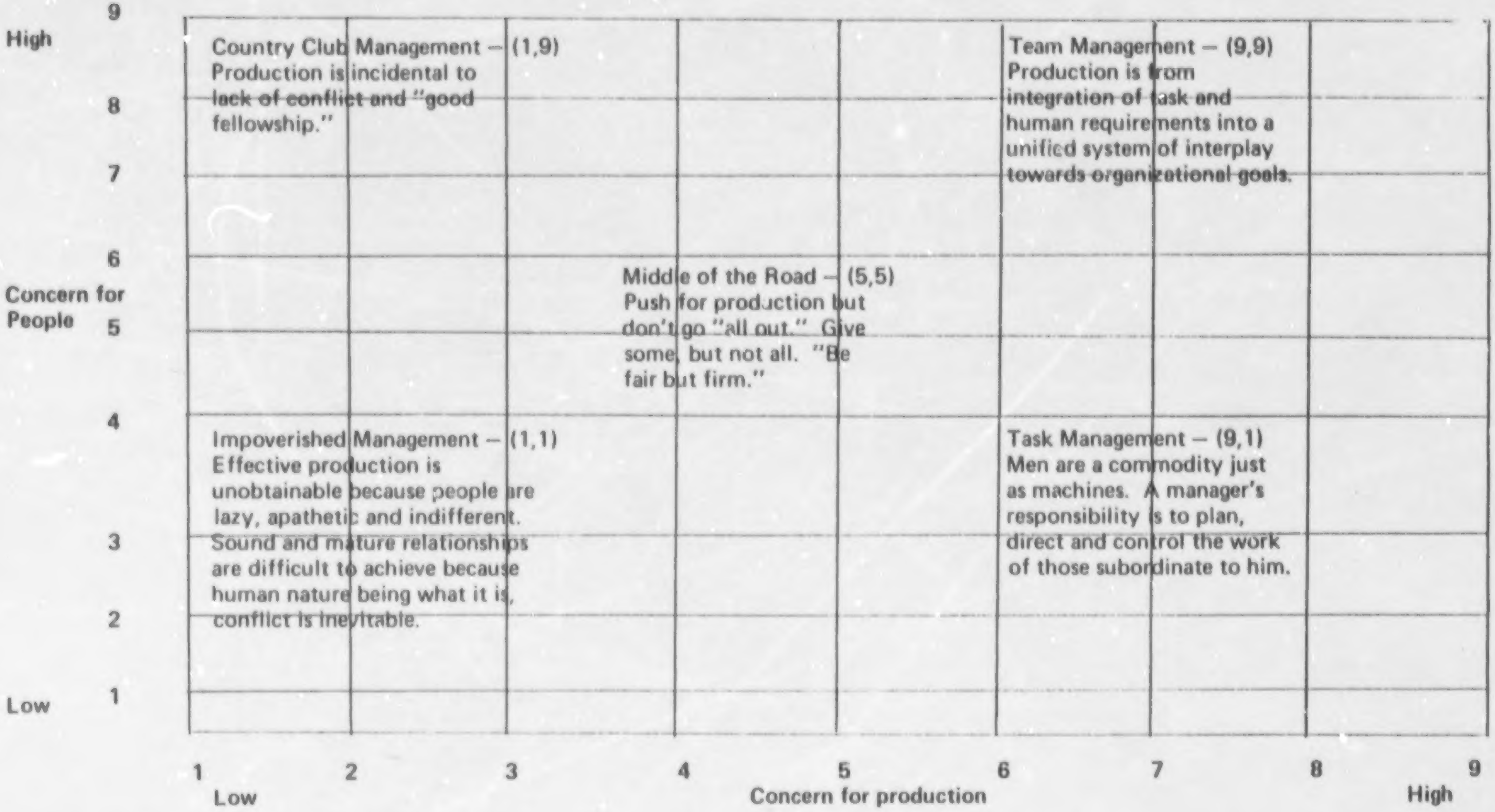
The words *production* or *human relationships* cover a range of considerations. Attitudes toward production, for example, may be assessed through the number of creative ideas that applied research turns into useful products, procedures or processes; quality and thoroughness of staff services; workload and efficiency measurement; or units of output. Production is not limited to *things*. Its proper meaning covers whatever it is that people are engaged in accomplishing. In a similar fashion, human aspects of interaction cover a variety of different concerns. Included are concern for degree of personal commitment to completing a job for which one is responsible; accountability based on trust rather than force; self-esteem or the personal worth of an individual; desire for a sense of security in work; social relations or friendships with co-workers, etc. As will be seen, *concern for production* and *concern for people* are expressed in vastly different ways, depending on the specific manner in which these two concerns are joined together.

The *Managerial Grid* shows these two concerns and possible interactions between them. The horizontal axis indicates concern for production while the vertical axis indicates concern for people. Each is expressed as a nine-point scale of concern. The number 1 in each instance represents the minimum concern. The number 9 represents maximum concern.

There are 11 managerial theories which may be shown on this grid. However, emphasis just now will be placed on the corners and the mid-point. This will identify five theories. These extreme positions are seldom found in pure form, but they make clear cut examples to discuss and then, too, there are situations that approach rather closely one or the other of these positions. The other six theories will be examined later.

At the lower left corner of the grid is the 1,1 style. This has the minimum of both *concern for production* and *concern for people*. Going up the grid from the 1,1 style to the upper left corner is found the 1,9 style. Here there is maximum concern for people but minimum for production. In the lower right corner is 9,1. This style has a maximum concern for production. In the lower right corner is 9,1. This style has a maximum concern for production and a minimum concern for human relationships. In the upper right corner is the 9,9 style, which has a maximum concern for both human relationships and production. Then, in the center is the 5,5 style, which is a "middle of the road" style in both kinds of concern.

# THE MANAGERIAL GRID



**Country Club Management – (1,9)**
Production is incidental to lack of conflict and "good fellowship."

**Team Management – (9,9)**
Production is from integration of task and human requirements into a unified system of interplay towards organizational goals.

**Middle of the Road – (5,5)**
Push for production but don't go "all out." Give some, but not all. "Be fair but firm."

**Impoverished Management – (1,1)**
Effective production is unobtainable because people are lazy, apathetic and indifferent. Sound and mature relationships are difficult to achieve because human nature being what it is, conflict is inevitable.

**Task Management – (9,1)**
Men are a commodity just as machines. A manager's responsibility is to plan, direct and control the work of those subordinate to him.

# LEADERSHIP

Managerial scholars and practitioners have been perplexed for years by the phenomenon of leadership in organizations. Some behavioral theorists and reserchers have projected the impression that leadership is synonymous with managership. Leaders are found not only in the managerial hierarchy, however, but also in informal work groups.

There are many definitions of leadership but the common thread running through them all is the key words *influence* and *interaction.* One individual exerting his influence over others in his group is the most accepted definition but leadership occurs only when there is interaction between individuals.

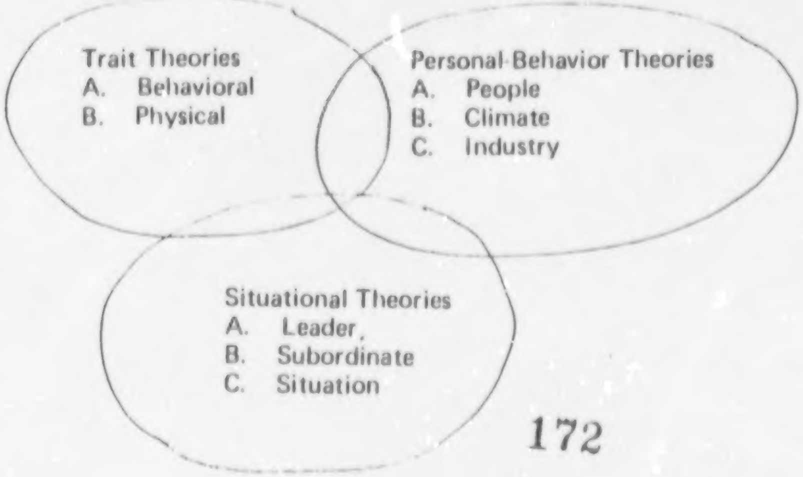
Several attempts have been made to clarify and depict the basis upon which a superior might influence a subordinate or a group of subordinates. There are five different bases of power.

Coercive power – this is power based upon fear
Reward power – opposite of coercive power
Legitimate power – power derived from position as manager in the organizational hierarchy
Expert power – individual with some expertise, special skill or knowledge
Referent power – based on a follower's identification with a leader

Coercive, reward and legitimate power are specified primarily by individual's position in organization while the degree and scope of a manager's referent and expert power bases are dictated primarily by individual characteristics.

There appear to be three broad leadership theory categories that have evolved from the recent stop and organize efforts. They are the *trait theories,* the *personal-behavior theories* and the *situational theories.* The following diagram shows that the trait and personal-behavior theories can be integrated to yield the situational approach.

Overlap of Theories of Leadership



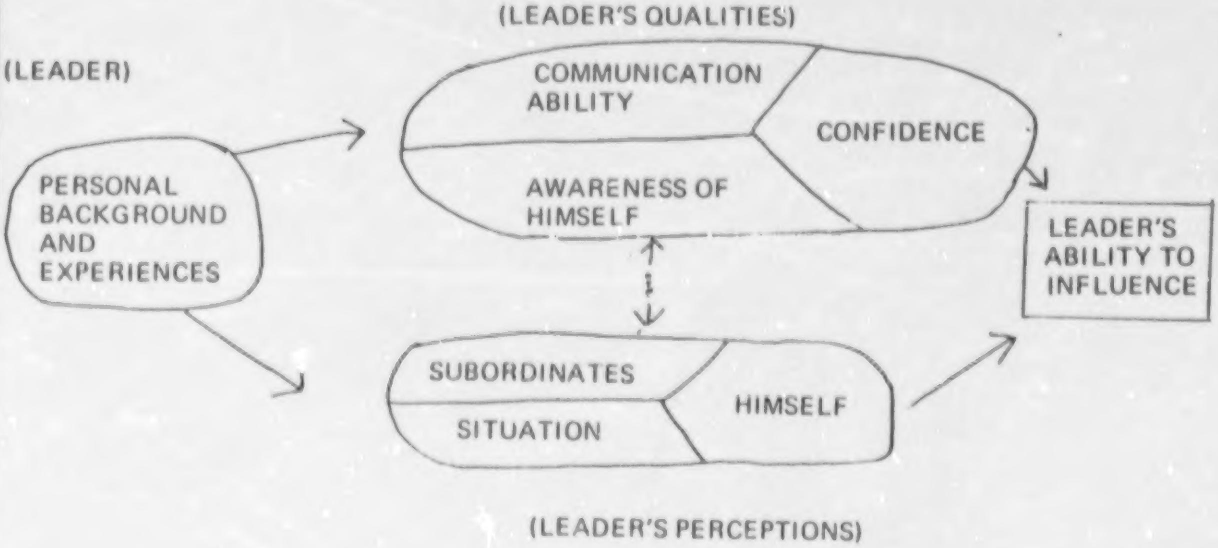
Trait theories – There are advocates who contend that the physical stature of a person affects his ability to influence followers, and that leaders who have the drive to act independently and are self-assured are successful. Leadership ability is also associated with judgement and verbal facility of the leader.

Personal-Behavior theories – This approach contends that leaders may best be classified by personal styles or behavioral patterns.

Situational theories – Adaptive theory of leadership. Leadership approach is flexible enough to adapt to different situations. Leadership is described as being a function of the leader's personality, the group's personality and the situation.

There is no one best way to lead people. Any leader should be aware of his impact on those he leads. The leader must influence followers in such a manner that high productivity is achieved, high group morale exists, and development of followers and low problem areas are achieved.

**An Integrative Perspective of Leadership**


(LEADER'S QUALITIES)
(LEADER)
COMMUNICATION ABILITY
CONFIDENCE
AWARENESS OF HIMSELF
PERSONAL BACKGROUND AND EXPERIENCES
LEADER'S ABILITY TO INFLUENCE
SUBORDINATES
SITUATION
HIMSELF
(LEADER'S PERCEPTIONS)

# MARKETING

Copy over on piece of paper and answer.

DICE Cases – Please answer using the DICE formula.

1. You have just been hired as a supervisor at a new branch of the plant you work for. You have been with the company for 2 years and the assistant supervisor at the new plant who will work under you has been employed by the company for 5 years. He is upset because you were promoted in and have less time with the company than he does. He is also making a lot of mistakes on purpose and talking about quitting. He has been an excellent worker with a good work record and knows the job better than anyone at the new plant.

2. You have been given a promotion, if you want it, to go to Charleston, S.C. with your company. The new job will pay a lot more, you will be provided with a car and some additional vacation time. You do not want to move to Charleston, but you also know the company you work for has a policy that if you do not take a transfer when offered, they do not offer you another promotion.

3. The company you work for has just hired a new manager and he has put a lot more work on all the employees but does not give any extra time. The old manager used to let you talk or rest when things weren't busy, but the new manager wants you working all the time and last night chewed you out for not being busy when there was nobody in the store. "You should sweep up when there are no customers," he told you. A lot of the employees are talking about "getting" the new manager or putting in a union. "How do you feel about it?" they asked.

4. You are a manager and you have an excellent employee who does a good job at all times and is a hard worker. She has been missing about 1 day a week due to sickness for about a month now and she also comes in late 2 or 3 times a week. You've had two talks with her and she says she will do better, but hasn't. Now some of your other workers are calling in sick more often than they did and coming in late. What do you do about the problem?

D – DEFINE THE PROBLEM
I – IDENTIFY SOLUTIONS
C – CHOOSE THE BEST SOLUTION
E – EVALUATE HOW WELL YOUR SOLUTION SOLVES THE PROBLEM

# THE MANAGERIAL GRID: KEY MANAGERIAL ORIENTATIONS FOR OBTAINING PRODUCTION THROUGH PEOPLE*

**The University of Texas**

A revolution is underway which is modernizing management practices. Conventional ways of organizing and managing employees are being questioned. Many things assumed to be true about managerial behavior are being given close inspection. The reason is to see whether or not they will stand up under new discoveries by the sciences which study human behavior.

The past 50 years have seen great advances in the physical sciences. These have resulted in new processes and new products and the transformation of technical aspects of work. Equally important are advances in the sciences which study the behavior of people. Discoveries made in these sciences have opened the door for real improvement in organizational performances through wiser management of people.

## A Science of Management

In the past, people did not think of management (or of supervision) as a science. Rather, they spoke of the "art of managing." This "art" was something a manager either had or did not have. Furthermore, it was believed that this "art" probably could not be taught, except by the hard knocks of practical experience. And, even if it could be taught, the person who did not have this flare for people probably could not learn much, no matter how hard he tried.

Based on massive behavioral science evidence to the contrary, this attitude towards management is now being replaced. The discovery, systematic description, and concrete use of principles of behavior in organizational settings has demonstrated that managing is an applied science. As with any science, so too here; this science can be taught and it can be learned. These new developments are based on two considerations. One is that experimental studies in human behavior have produced a body of knowledge concerning the kinds of performance results that may be expected as people work together under various supervisory conditions. The other is that improved understanding about training now makes it possible to teach people to use this knowledge of human behavior in the practice of management. In other words, individuals in supervisory positions now have available for use a science of management based on systematic principles, which can be taught and which then may be applied.

For about ten years, particularly in the last five, a number of America's major corporations have been learning to apply these management concepts to improve their organizations. A number of inquiries have been conducted in the plants of these corporations to assess results obtained when behavioral science concepts and methods are used in industrial situations. Results to date have been encouraging.

*Robert R. Blake and Jane Srygley Mouton

Since profits play the vital role in a corporation's life, it is interesting to learn that results to date indicate significant improvement in P/L from application of these behavioral science concepts within production components of plants. In addition, union-management conflict has been relieved and replaced by a relationship of cooperation based on solving problems of mutual concern. Distrust and suspicion, which had existed between operating departments and staff groups, have been reduced in some cases, essentially eliminated in others. The same is true where there was a disturbed relationship between a headquarters unit and a plant reporting to it. Another favorable result has been the improvement, through team effort, in decision-making at operating levels.

What is being said, then, is this: A revolution in the behavioral sciences is producing a science of management. At the same time, a revolution in training methods is aiding people in management positions to learn to apply these principles in concrete situations. The implications of these developments for organization improvement are far reaching.

**Management Skills in Marketing**
**Supplement 5**

A

PROFITABLE

EDUCATIONAL

EXPERIENCE

FOR D. E. STUDENTS

"GOING INTO
BUSINESS
FOR YOURSELF"

## Business Projects and Assignments

I. Description of Business

- A. Name and type of business
- B. Type of ownership
- C. Government regulations
- D. Design logotype

II. Location of Business

- A. Indicate exact location on area map.
- B. Provide detailed plot of the immediate housing area.
- C. State all factors for choice of location.
  - 1. Buy, lease, or rent: explain terms.
  - 2. Zoning of location.
  - 3. Locate trading area and competition on map.
  - 4. Research of area-customer count, traffic flow, parking, business trends in the area, relocation of roads, transportation, etc.
  - 5. Be prepared to defend your choice of location.
  - 6. Explain the possibilities for future expansion.

III. Layout of the store, parking area, etc., in detail and to a reasonable scale

- A. Detailed drawings of building exterior and plot.
- B. Detailed drawings of building interior including fixtures and equipment.
- C. Picture of sketch of front elevation of business with sign.
- D. List casts of major equipment and fixtures by items and/or remodeling.

IV. Customer Analysis

- A. To what class or type of customer will the business cater and how was this determined?
- B. How will you find out about customer wants?

V. Merchandising

- A. What items will the business carry (or services offered)?

- B. Buying procedure
    - 1. Where will the merchandise be purchased and why?
    - 2. Explain the buying procedure.
    - 3. Terms and services available.
- C. List sample inventory and prices at cost.
- D. Mark-up and pricing.

### VI. Financing the Business

- A. Amount needed (assume one-half of capital is on hand).
    - 1. Statement of building fixtures, etc.
    - 2. Statement of operating capital needed for one month (include taxes, insurance, professional fees, etc.).
- B. Compare sources of financing.
- C. Your choice of financing and why.

### VII. Business Organization

- A. Prepare a business organization chart showing the departments and line of authority.
- B. Personnel
    - 1. Number needed and major duties of each
    - 2. Selection procedure
    - 3. Training
    - 4. Wages and benefits

### VIII. Stock Control

- A. Show sample order
- B. Receiving and checking procedure
- C. Marking and stocking procedure

### IX. Sales Promotion

- A. Advertising
    - 1. Media to be used and why.
    - 2. Prepare advertising campaign.
- B. Display
    - 1. Interior display
    - 2. Exterior display
- C. Special events – fashion show, open house, etc.

X. Sales and Services

- A. Sales demonstration
- B. Customer service – credit, collection, delivery, etc.

XI. Records

- A. Method of recording the following
  - 1. Stock inventory
  - 2. Sales and purchases
  - 3. Cash and expenses
  - 4. Payroll
- B. Financial statements
  - 1. Sample profit and loss sheet
  - 2. Sample balance sheet

XII. Conclusions

- A. State conclusions pertaining to the possible success of the business.
- B. Explain why project owners of the business can or cannot operate the business successfully.

**Summary** At all times the student is to feel free to consult the teacher/coordinator for advice. The teacher/coordinator in turn will direct the student's effort and thinking to the desired goal–understanding. This project can involve many topics and serve as a summary for the year and thereby have each student utilize, with some immediacy, the knowledge gained in his/her course work in distributive education.

# MANAGEMENT SKILLS IN MARKETING

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Teaching Time: 2 weeks

# STORE ORGANIZATION AND OPERATIONS

## UNIT OUTLINE

- I. Organization of Marketing
  - A. Personnel
  - B. Areas of Retailing

- II. Store Operations
  - A. Receiving and Processing Merchandise
  - B. Store Maintenance
  - C. Store Security
    - 1. External Theft
    - 2. Internal Theft
  - D. Accounting and Credit
    - 1. Policies
    - 2. Factors in Granting Credit
    - 3. Credit Operations

**GENERAL PURPOSE:** To describe the structure of marketing organizations and to provide instruction and skill building activities in the operations functions.

UNIT: Store Organization and Operations

| CONTENT AND ESSENTIAL LEARNING | BEHAVIORAL OBJECTIVES | PROCEDURES AND LEARNING ACTIVITIES | RELATED RESOURCES |
|---|---|---|---|
| I. Organization of Marketing<br>A. Personnel | Following teacher instruction, the student will be able to read and interpret an organization chart and the divisions, responsibilities, and authority lines depicted with 100% accuracy. | (T) 1. Discuss what factors comprise a large store and a small store. | *Retailing: Principles and Practices,* Chapter 34<br>*Retailing Merchandising,* Chapter 14<br>*General Merchandise Retailing,* Chapter 16<br>*Food Services,* Chapter 14 |
| | | (T) 2. Using a transparency of a sample organizational chart, discuss and compare the organization of both a large store and a small store. | |
| | | (T/S)3. Have cooperative education students obtain a copy of the organizational chart for their training stations. Have each student share the chart with the class and describe its importance. | *Jeffrey's Department Store,* Simulation 1 (Incidents 9 and 10)<br>*Strawberry Mall,* Activity 14 |
| | | (T) 4. Explain how an organizational chart graphically presents relationships between employee and supervisor. | *Retailing: Principles and Practices,* Chapter 33 |
| | | (T) 5. Discuss the role expectations of the supervisor. | |
| | | (T) 6. Illustrate concepts of authority and responsibility as they relate to line and staff relationships. | *Food Services,* Chapter 14 (Experience 14-1) |

| CONTENT AND ESSENTIAL LEARNING | BEHAVIORAL OBJECTIVES | PROCEDURES AND LEARNING ACTIVITIES | RELATED RESOURCES |
|---|---|---|---|
| B. Areas of Retailing | Given a teacher-developed test, the student will be able to name the five areas of retailing and write a description of each with 90% accuracy. | (T) 1. Describe the division of responsibility into broad areas within the retail setting.<br>a. Merchandising<br>b. Sales promotion<br>c. Finance and credit<br>d. Personnel<br>e. Operations<br>(S) 2. Divide into five groups. Select one of the areas of retailing and research career opportunities. Report findings to class. | *Retailing: Principles and Practices,* Chapters 2 and 8<br>*Retail Merchandising,* Chapter 14 |
| II. Store Operations<br>A. Receiving and Processing Merchandise | Given a case study concerning receiving and processing merchandise, the student will be able to identify and demonstrate the procedure in receiving merchandise and processing the merchandise for sale. Each stage must be in the correct order and forms must be complete with 90% accuracy. | (T) 1. Describe warehousing methods of unloading trucks, operating materials, handling equipment, processing priorities, and routing merchandise.<br>(S) 2. Complete a merchandise routing assignment.<br>(T) 3. List and define terms used in receiving. Explain guidelines for processing shipments and outline movement of merchandise from shipper to stocking.<br>(T) 4. Using sample forms, discuss records required in receiving and processing merchandise. | *Retail Merchandising,* Chapter 45<br>*Operations,* LAP 4 (No. 669-A, 669-B, 701-A, 701-B, 702-A, 702-B) |

| CONTENT AND ESSENTIAL LEARNING | BEHAVIORAL OBJECTIVES | PROCEDURES AND LEARNING ACTIVITIES | RELATED RESOURCES |
|---|---|---|---|
| | | (S) 5. Complete a receiving apron, composite receiving report, and a daily receiving report. | |
| | | (T) 6. Discuss a flow chart which illustrates vendor's invoice, packing slip, freight bill, bill of loading, delivery receipt, and purchase order. | |
| | | (T) 7. List and define terms associated with problems in receiving. Describe types of losses or damages that may occur, procedures for filing claims, and follow-up on non-delivered or lost merchandise. | *Operations,* LAP 6 (No. 642-A, 642-B, 642-C, 642-D, 643-A, 706-A) |
| | | (T) 8. Explain procedure to follow when handling incorrect amounts or types of received merchandise. Illustrate proper packing and wrapping techniques. | *Operations,* LAP 7 (No. 639-A, 700-A, 700-B, 707-A)<br>*Retailing: Principles and Practices,* Chapter 29 |
| | | (S) 9. Practice wrapping one breakable and one non-breakable item. | *Operations,* LAP 7 (No. 700-C) |
| | | (T) 10. Discuss price marking procedures. If equipment is available, demonstrate the operation of a variety of marking machines. Show examples of price tickets and discuss matching of tickets to merchandise. | *Retail Merchandising,* Chapter 46<br>*Retailing: Principles and Practices,* Chapter 19<br>*Strawberry Mall,* Activity 43<br>*Operations,* LAP 9 (No. 644-A, 644-B, 645-A, 645-B) |

| CONTENT AND ESSENTIAL LEARNING | BEHAVIORAL OBJECTIVES | PROCEDURES AND LEARNING ACTIVITIES | RELATED RESOURCES |
|---|---|---|---|
| | | (S) 11. Practice using price marking equipment, if such is available.<br>(T/S) 12. Arrange field trip to a warehouse to observe receiving and processing procedures. | |
| B. Store Maintenance | Given a case study of a customer accident situation, the student will be able to outline the proper emergency procedures to follow and describe how the accidents could have been prevented with 100% accuracy. | (T) 1. Discuss the importance of maintaining a well-kept store. Describe techniques of handling and caring for store equipment. List and discuss areas of responsibility of the store maintenance department. Identify situations where accidents may occur and ways to prevent them. | *Retail Merchandising,* Chapters 44 and 47<br>*Retailing: Principles and Practices,* Chapter 20<br>*Food Services,* Chapter 14 (Experiences 14-12 through 14-20)<br>*Operations,* LAP 1 (Nos. 750-A, 699-A, 614-A, 728-A), LAP 10 (No. 648-A), LAP 2 (Nos. 788-A, 732-A, 615-A) |
| | | (T) 2. List guidelines to follow in emergency situations. Invite a representative from the Red Cross to discuss accident prevention and demonstrate first aid procedures. | |
| | | (S) 3. Have students role play situations involving customer accidents, employee accidents, and fire procedures. | *Jeffrey's Department Store,* Simulation 7 (Incidents 5 and 6)<br>*Operations,* LAP 2 (No. 660-A) |

**UNIT:** Store Organization and Operations

| CONTENT AND ESSENTIAL LEARNING | BEHAVIORAL OBJECTIVES | PROCEDURES AND LEARNING ACTIVITIES | RELATED RESOURCES |
|---|---|---|---|
| C. Store Security<br>1. External Theft | Given a teacher-developed test, the student will be able to list at least four types of external thefts with examples of each with 100% accuracy. | (T) 1. Explain causes of shortages, damages, and theft of stock and the relationship of effective stockkeeping to prevention. Discuss methods of dealing with suspected shoplifters and security procedures to follow.<br>(S) 2. Have students name causes for stock shortages and causes for stock damages. List methods for dealing with a suspected shoplifter and stockkeeping methods which could prevent shortages/thefts.<br>(T) 3. Invite a store manager to speak concerning store security measures, losses incurred due to shortages, damages, and theft.<br>(T) 4. Show and discuss the film "Shoplifting: It's a Steal." | *Retail Merchandising,* Chapter 49<br>*Retailing: Principles and Practices,* Chapter 21<br>*Strawberry Mall,* Activity 44<br>*Jeffrey's Department Store,* Simulation 7 (Incidents 1, 2, 4)<br>*Food Services,* Chapter 14 (Experience 14-22)<br>"Shoplifting: It's A Steal" (film) |
| 2. Internal Theft | Given a teacher-developed test, the student will be able to describe three signals that indicate employee theft and one appropriate method to deal with each with 100% accuracy. | (T) 1. Discuss employee theft of merchandise, cash, and time (late to work, long lunches, or breaks). Describe signals which indicate employee theft and appropriate ways to deal with it. | *Retailing: Principles and Practices,* Chapter 31<br>*Jeffrey's Department Store,* Simulation 7 (Incident 3)<br>*Food Services,* Chapter 14 (Experience 14-21) |

| CONTENT AND ESSENTIAL LEARNING | BEHAVIORAL OBJECTIVES | PROCEDURES AND LEARNING ACTIVITIES | RELATED RESOURCES |
|---|---|---|---|
| | | (S) 2. Have students brainstorm for ways to prevent or reduce losses due to internal thefts. | |
| D. Accounting and Credit<br>1. Policies | Given a teacher-developed test, the student will be able to describe credit policies, why credit is offered, credit card systems, and legal requirements of offering credit with 90% accuracy. | (T) 1. Discuss credit policies and list the advantages and disadvantages of each. | *Retailing: Principles and Practices,* Chapter 50<br>*Retail Merchandising,* Chapter 17<br>*Operations,* LAP 17 (Nos.736-A, 735-A), LAP 20 (Nos. 684-A, 684-B, 684-C, 684-D, 684-E, 684-F, 684-G) |
| | | (T/S) 2. Discuss credit card systems. Have students bring various credit card contracts to compare the requirements for payment of each. | |
| | | (T) 3. Discuss the legal requirements of offering credit and the laws governing credit. | |
| | | (T) 4. Invite a credit manager to discuss accounting procedures and the role of credit in marketing. | |
| 2. Factors in Granting Credit | Given a credit application, the student will be able to describe how to request and obtain credit information and complete the application with 90% accuracy. | (T) 1. Discuss the characteristics of credit accounts, describing the three C's of credit. | *Retailing: Principles and Practices,* pp. 399-404<br>*Retail Merchandising,* Chapter 17<br>*Strawberry Mall,* Activity 17<br>*Operations,* LAP 18 (Nos. 739-A, 739-B, 596-A, 596-B, 602-A, 602-B, 689-A, 689-B, 685-A, 685-B, 685-C, 685-D) |

UNIT: Store Organization and Operations

| CONTENT AND ESSENTIAL LEARNING | BEHAVIORAL OBJECTIVES | PROCEDURES AND LEARNING ACTIVITIES | RELATED RESOURCES |
|---|---|---|---|
| | | (T) 2. Discuss the methods of obtaining information about credit applicants and sources of credit information.<br>(T) 3. Discuss the procedures in requesting information from the credit bureau.<br>(T) 4. Explain the procedure in filling out a credit application and how to reject or accept a credit application.<br>(S) 5. Have students review case studies to practice decision making concerning rejecting or accepting credit applications.<br>(T/S)6. Visit a credit bureau to observe its mechanics and understand how it functions. | |
| 3. Credit Operations | Given sample forms, the student will be able to demonstrate the procedures for sending out statements, recording payments, and collecting overdue accounts with 100% accuracy. | (T) 1. Explain credit operations by outlining the accounting procedures used to detail a charge sale from purchase to payment. | *Retailing: Principles and Practices,* Chapter 51<br>*Jeffrey's Department Store,* Simulation 10 (Incident 1)<br>*Retail Merchandising,* Chapters 17 and 55<br>*Operations,* LAP 19, (Nos. 595, 600, 680), LAP 21 (Nos. 601, 737-A), LAP 20 (Nos. 597, 603, 681-A, 681-B, 681-C) |

UNIT: Store Organization and Operations

| CONTENT AND ESSENTIAL LEARNING | BEHAVIORAL OBJECTIVES | PROCEDURES AND LEARNING ACTIVITIES | RELATED RESOURCES |
|---|---|---|---|
| | | (T) 2. Explain billing, recording payment, and procedures for collecting overdue accounts.<br>(T) 3. Discuss the role of data processing in marketing and, specifically, credit operations. | |

197

198

## STORE ORGANIZATION AND OPERATIONS

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